Monitoring Study of the Group Information Sessions

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Monitoring Study of the Group Information Sessions

Final Report

Evaluation and Data Development

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Executive Summary

This Executive Summary presents the integrated findings of the three sites researched in the context of the Monitoring Study of the Group Information Sessions (GIS). These three sites were Lethbridge, Alberta and Mississauga and York, Ontario. Detailed findings on each of the sites are presented in separate reports. The methodology used to conduct this study consisted of preliminary interviews with key informants, review of documents and administrative data, site visits (observation of a GIS, focus groups with clients and local design and delivery teams, and interviews with key informants), and follow-up research.

Background

Shaping the Future, a Human Resources Development Canada (HRDC) initiative whose objective is to introduce active interventions

to help implement behavioural changes in employees and workers, introduced the concept of the GIS and the Group Service Needs Determination (GSND). These information sessions are intended to ensure that individuals are aware of their responsibilities under Employment Insurance (EI) and of the services available to them, and to support the requirements of Bill C-12. The strategy includes assisting individuals to return to work more quickly, reducing EI dependency and protecting the integrity of the EI account.

The main objectives of this GIS Monitoring Study were to study and document in detail the practical experiences of three Human Resource Centres of Canada (HRCC) with GIS and to summarise and publish findings with a focus on what works best, including best practices and lessons learned. As a monitoring study, the report does not attempt a comparison with other alternatives, but merely describes and tracks GIS activities, and assesses them against the objectives of the *Shaping the Future* initiative.

The three types of GIS researched in the context of this monitoring study were all formally introduced in 1995. The rationale for implementing GIS in Lethbridge and York was driven by a desire to efficiently inform clients of their rights and obligations with respect to Unemployment Insurance/Employment Insurance (UI/EI) in a consistent manner and to detect fraud and abuse of UI/EI. On the other hand, "Booster Sessions" (the sessions researched in Mississauga in the context of this monitoring study) were introduced to fill a gap in the services available to unemployed individuals in their eight to tenth week of Employment Insurance claims.

Despite the fact that the rationale for implementation was different among the three sites examined and that the three types of sessions were delivered at different points in an EI client's claim, they are all aimed at regular (i.e., Type 2) claimants. In all three sites, clients are directed (as opposed to invited) to attend GIS. This means that the sessions are mandatory and that failure to attend can have an impact on the benefits of clients who cancel without good cause or fail to report to the session. The three sites have procedures that allow them to determine whether a reason given for cancelling is "a good cause". Focus group participants in both Lethbridge and Mississauga reacted quite negatively to the tone of the letter, which they found threatening. It was suggested that providing more information on the objectives and content of the session in the letter would make participants more open to the upcoming sessions.

In both Lethbridge and York, the sessions are delivered by internal staff and last between 45 and 60 minutes. The full-day Booster Sessions in Mississauga are delivered by a third-party organisation, the Quality and Continuous Improvement Centre (QCIC), the originator of the concept of Booster Sessions. While the Lethbridge and York

sessions are straightforward presentations on rights and obligations, and employment issues (e.g., programs and services available), the Mississauga session is much more interactive. The topics covered in Mississauga are strictly related to employment and employability. EI rights and obligations are not discussed in depth in these sessions.

Cost and Savings

The information related to the costs of co-ordinating and delivering GIS and to the savings resulting from the three types of GIS examined are summarised in the table on the following page. It must be stressed that the figures presented in the table must be interpreted with care. Indeed, none of the three sites track the costs of co-ordinating and delivering their respective GIS (other than the cost of the contract with the third-party deliverer in Mississauga). As a result, the costs presented in the table are only estimates. Because net savings were calculated by subtracting costs from gross savings, net savings are also estimated. Furthermore, full-year estimates sometimes had to be extrapolated, based on the information available for a few months.

Summary of Cost and Savings Information

(April 1 to December 31, 1997)

Attribute	Lethbridge Figures	York Figures	Mississauga Figures
Number of Scheduled Clients	1,218	9380	5,919
Number of Disqualifications and Disentitlements	355	235	582
Cost			
Total Operational Cost for	$60,900	$81,047	$275,459
Operational Cost per Scheduled Client	$50	$9	$47
Gross Savings			
Direct Savings	$46,924	$59,826	
Indirect Savings	$1,225,785	$714,410	
Total Gross Savings	$1,272,709	$744,236	$1,572,298*

Gross Savings per Scheduled Client	$1,045	$79	$266
Gross Savings per Disqualifications and Disentitlements	$3,585	$3,166	$2,702
Net Savings			
Total Net Savings	$1,211,809	$663,189	$1,296,839
Net Savings per Scheduled Client	$995	$71	$219
Net Savings per Disqualifications and Disentitlements	$3,414	$2,822	$2,228
Note: Direct and indirect savings could not be segregated.			

Objective Achievement and Outcome

The objectives of the *Shaping the Future* initiative are the following:

- introduce active interventions to help implement behavioural changes in employees and workers;
- assist individuals to return to work more quickly;
- reduce EI dependency; and
- protect the integrity of the EI account.

Assessing the extent to which the three models are achieving these objectives is difficult to do given the nature of the objectives and of the research questions developed for this study. However, the findings of the monitoring study indicate that of the three models, the Booster Sessions are most effective at having an impact on the behaviour of clients in the area of employment search. However, given the focus of the York and Lethbridge models on EI Rights and Obligations, these two models are more likely to have an impact on behaviours such as the accurate completion of cards or preventing fraudulent use of the system.

The impact of the GIS on assisting individuals to return to work more quickly cannot be assessed with certainty using the findings from this study. However, to the extent that clients in all three sites are provided with information on available programs and services that can help

them in their job search, it would be expected that the GIS would have some impact in this area. The Mississauga model, in particular, would be expected to contribute to the achievement of this objective given the site's objectives of motivating clients to maintain their job search and make it as effective as possible. A few instances were indeed given of clients who had taken steps to accelerate their job search or found work as a result of the Booster Sessions.

Assessing the extent to which dependency on EI is reduced is a very complex endeavour that can only be determined with longitudinal data, and is therefore out of the scope of this study.

The findings related to the number of Disqualifications and Disentitlements (D&Ds) imposed as a result of GIS-related activities clearly indicate that all three models play an important role in protecting the integrity of the EI account.

1. Introduction

The purpose of this report is to present the findings from the Monitoring Study of the Group Information Sessions (GIS). This report summarises the findings of the three case studies researched as part of this assignment (Lethbridge, Alberta, and Mississauga and York, Ontario).

This section of the report provides contextual information for the Monitoring Study, presents the study's objectives and scope, and outlines the presentation of the report.

1.1 Context

On March 7, 1996, legislation to create a new Employment Insurance (EI) system was introduced into the House of Commons. The Employment Insurance Act, or Bill C-12, came into effect on July 1, 1996, replacing the Unemployment Insurance (UI) Act and the National Training Act. Among other things, the new Act is intended to secure $1.2 billion in savings by the fiscal year 2001-02.

Shaping the Future, a Human Resources Development Canada (HRDC) initiative whose objective is to introduce active interventions to help implement behavioural changes in employees and workers, introduced the concept of the GIS and the Group Service Needs Determination (GSND). These information sessions are intended to ensure that individuals are aware of their responsibilities under EI and

of the services available to them, and to support the requirements of Bill C-12. The strategy includes assisting individuals to return to work more quickly, reducing EI dependency and protecting the integrity of the EI account.

A GIS can be used to identify individuals who require enhanced employment services, those who should be subject to a continuing entitlement review as well as individuals who might be fraudulently accessing EI. GIS also provide Human Resource Centres of Canada (HRCC) with a way of dealing with capacity issues at the local level. Instead of individually dealing with the needs of each claimant, an HRCC can deal with the needs of many people at once while ensuring that each client is kept informed. In addition, an HRCC might choose to use third- parties to deliver GIS.

The notion of GIS was first introduced in 1990. The Québec-Charlesbourg and Medicine Hat HRCCs were each piloting GIS on their own. The Québec-Charlesbourg HRCC introduced the session to inform claimants of the services available to claimants and their obligations under the EI Act. The session in Medicine Hat was designed to complement other interview programs or interventions. The Investigation and Control (I&C) managers at each of these HRCCs developed their own script and implemented the sessions independently.

In 1991, a Control Branch team from National Headquarters (NHQ) was formed to report on these sessions. "The objective of the project was to develop a strategy to interview claimants who are not subject to any of the Commission's programs or services to ensure they are aware of the services available and to verify their entitlement to UI benefits."[1] Some members of the team observed the sessions conducted by these HRCCs and measured related savings results. A formal GIS pilot test was conducted at the London HRCC. Based on the success of the London GIS pilot, the NHQ Team submitted a GIS proposal to the Commission in July of 1994. The NHQ team reported that the GIS would be an efficient way of using available resources. The flexibility of scheduling only as many sessions as there are resources (both people and time) with any number of participants permits the HRCC to fill the low period created by fluctuating workload. The Commission gave its approval to go ahead with implementation on September 16, 1994.

The NHQ Team, in conjunction with 4 HRCC representatives (I&C and Insurance Supervisors from the London, Kingston, Medicine Hat and Quebec City HRCCs), developed an Instructional Package and Guidelines for conducting a GIS. The package was based on a combination of materials used by these HRCCs. Implementation as well as the scope of the GIS was left to the discretion of each individual region.

1.2 Monitoring Study Objectives and Scope

The GIS Monitoring Study was designed to collect information on the relevance of this measure to return people to work and generate savings to the EI account. More specifically, the major objectives of the monitoring study included the following:

- to study and document in detail the practical experiences of three HRCCs with GIS; and
- to summarise and publish findings with a focus on what works best, including best practices and lessons learned. This was done in order to assist HRDC, its regional offices, and HRCCs and their communities to enhance their existing administrative measures designed to help EI clients return to work faster, increase work incentives, reduce EI dependency and protect the integrity of the EI account.

The specific research questions addressed by this study are presented in Exhibit 1.

Exhibit 1 **Research Questions**
1.0 Rationale for the GIS
1. What were the motivations for introducing the GIS? What specific issues were the GIS intended to address? (1.0, Q.1 & 2)'
2.0 Design
2.1 Design Process
1. What was the process used to design the GIS? Who participated in the process? 2. What were the content and format selected for the GIS (e.g., various elements or modules that make up the session, length, # of participants)? What types or sources of information were used (e.g., materials from other types of information sessions or published in other sources)? 3. What materials were developed for the GIS (e.g., guides for the deliverers, handouts for clients)? Who prepared them? 4. Were the GIS tailored to different client groups? 5. Were there expected impacts for the GIS identified at the design stage? Were they documented? Was a monitoring

design stage? Were they documented? Was a monitoring system developed during the design phase to measure effectiveness in relation to expected impacts?
6. Did the design team encounter any challenges during the design phase? How were these challenges addressed?

2.2 Client Selection

1. Were the GIS originally intended for specific client groups? If yes, what was the rationale? Have client selection targets changed in any way since the GIS were first implemented?
2. How are claimants identified as potential GIS participants? Were specific criteria developed? Were the criteria pre-tested?
3. How are potential GIS participants contacted (i.e., confirmation letter, phone call, HRCC bulletin board, third-party)? How effective is that process? How soon after they have established a claim are they contacted?

3.0 Implementation and Delivery

3.1 Implementation

1. When were the GIS first introduced?
2. Was the full session implemented, as designed, on Day 1, or was it implemented in stages over a period of time?
3. Was a GIS pilot test conducted? What did this pilot test involve (e.g., assessment of client satisfaction, feedback from deliverers)? How was success defined? How was it measured? What were the results of the pilot? Was the GIS modified as a result of the pilot test?
4. To what extent have the sessions changed since implementation? What specific changes have been made and why?

3.2 Delivery

3.2.1 Deliverers

1. Who delivers the sessions? Why was this method used? Where are the sessions delivered? Is the delivery of the GIS full-time work for the deliverers?
2. How are the session deliverers selected? What are the selection criteria and processes? Is there a difference in the selection processes between HRCC session deliverers and third-party session deliverers?
3. Do the deliverers receive GIS-specific training? How is this

training delivered? How is the training designed (e.g., modules, client group) and delivered?
4. Does the behaviour of the session deliverer differ from one setting to another?
5. At what frequency are the GIS delivered? What is the rationale behind this?
6. Is the performance of the deliverers monitored? If yes, how? What is monitored (e.g., attitude, number of claimants who show up for a session)?
7. Do the deliverers encounter any challenges during the delivery of the GIS (e.g., attitudinal barriers from clients, resource constraints)? How are these challenges dealt with?

3.2.2 Session Content

1. Are claimants required to provide any information before and/or at the session? How is this information captured (i.e., questionnaire, one-on-one interview, attendance form)? How is this information used (i.e., a pre-screening tool for employment services, entitlement review, investigation)? How effective is this process?
2. What type of information is provided to claimants before and/or at the session (i.e., Labour Market Information (LMI), Employment Benefits and Support Measures (EBSM), EI responsibilities, claimant statistics)? Do claimants recall having received written materials?
3. Do claimants prepare an Action Plan (AP) during the session? What is the process for preparing the AP? How is the AP used (e.g., personal tool for the client, monitoring tool for the HRCC)?

3.2.3 Referral Process

1. How are referrals to other programs/services or workers (e.g., other information sessions, enhanced services, active job search, entitlement review, investigation employment counsellor, Insurance agent, third-party) made (e.g., at the session, during a subsequent counselling session)?

4.0 Impact on Clients

1. After some time has passed, do claimants remember having participated in the session? What do they remember about the session?
2. Is there any evidence that the labour market or EI claim behaviour of claimants has changed as a result of participation in the session? For example, in the judgement

participation in the session. For example, in the judgement of the claimants:

- Are they searching more intensively for jobs?
- Are they accepting a job they might not have accepted before attending the session?
- Are they withdrawing EI claims?
- Are they returning to work faster than they might have otherwise?

3. Do the GIS have an impact on claimants' attitudes towards gaining/maintaining employment? Towards their EI rights and responsibilities?
4. In claimants' judgement, what purpose does the session serve? In their view, did the GIS accomplish this?
5. To what extent are the GIS useful to claimants? In what specific ways has the session been useful? Are there ways in which the session does not help claimants?
6. Have claimants' experience with the sessions affected decisions that other members of their families or friends have made with regard to employment or EI claim-related activities?

5.0 Satisfaction with GIS

5.1 Clients

1. Are claimants given an opportunity to evaluate the session and provide suggestions for improvements? When and how are they asked for feedback?
2. Are claimants satisfied with the session deliverers? With the design (i.e. content, format, materials) used?
3. Are claimants satisfied with their participation in the process? Are they satisfied with the decisions they made as a result of attending a GIS? Are they satisfied with the results achieved? To what extent do they feel that attending a GIS is a positive experience for participants?

5.2 Deliverers

1. Are the deliverers satisfied with the session design (i.e. content, format, materials used)?
2. Are those who are currently delivering the sessions satisfied with their job? In their assessment, is the session a positive experience for them?
3. What has been the turnover rate in the delivery staff? Is that considered high? If so, what factors contributed to this?

5.3 Managers

1. Are HRCC managers satisfied with the sessions and their outcomes? Are their goals being met?

6.0 Client Monitoring and Follow-up

6.1 Process

1. Are GIS participants and non-participants monitored? If so, how? Are the outcomes of claimants' GIS participation recorded (e.g., referred to intervention, other service)?
2. How are claimants who fail to report to a GIS followed up? Are there any consequences for claimants if they do not attend the GIS (e.g., disentitlement imposed)? Do claimants generally attend a GIS after disentitlement for failure to report?
3. Are claimants followed up upon being referred to another program or service? Are there any consequences for claimants, if they do not attend the program or use the services to which they were referred (e.g., denial of benefits)?

6.2 Claimant Attendance

1. How many claimants:
    - Are directed to a session in a given period of time (e.g., weekly, monthly)?
    - Actually attend the session for which they were scheduled?
    - Are referred to other programs/information sessions? Enhanced services?
    - Do not attend their GIS and are redirected to another session?
    - Do not attend their session and discontinue submitting their EI claims?
    - Are investigated for possible fraud as a result of information obtained at the session?

6.3 Denial of Benefits and Appeals

1. Does the participation in the session lead to:

- Increased incidence of benefit denials?
- Increased incidence of inquiries about decisions?
- Increased incidence of appeals?

2. Were the decisions to deny benefits correct? What was the "correct rate"? How is a "correct" decision defined?

7.0 Accountability Framework

7.1 Administration Costs

1. Does the HRCC have a dollar estimate for the costs and benefits associated with the GIS and related activities? If yes, how are these costs and benefits calculated?
2. What are the Full-time Equivalent (FTE) and dollar costs associated with the design, delivery and monitoring of the GIS? Is the level of resources used for these processes appropriate? If no, why not? Are there differences in the level of resources used among the settings? What factors may account for these differences? Have these costs increased or decreased over time?

7.2 Savings to the EI Account

1. Have there been measures developed to estimate the savings to the EI account that can be attributed to the GIS? Are the GIS savings measures linked to those associated with the Human Resources Investment Branch (HRIB) dataset or are they linked to other measures? Do the estimated savings to the EI account include the estimated costs of administration of the GIS, and associated follow-up activities (e.g., benefit denial, appeal)?
2. Are the GIS savings measures sound? How have they been validated? Are they compatible among the settings? Are they consistent over time? Is there a possibility of double counting if they are not linked to other measures? How frequently are the GIS measures reported?
3. Are there savings that are not being estimated? Which ones? Could they be estimated? If yes, how?
4. When taking into account the costs associated with designing and delivering the GIS (including the cost associated with enquiries and appeals) and the savings to the EI fund, does the GIS represent a cost or savings to the HRCC? Is there a difference among the settings? What factors may account for the differences?

8.0 A Guide to Help Implement a GIS

8.1 Lessons Learned

1. In the deliverers' judgement, has the implementation of the GIS been a positive or negative experience? What do they like the most about this job? What would help them to do a better job?
2. Do clients feel that the GIS should be modified in any way to improve it? If yes, why and how?
3. Based on the information and analysis presented in this study, what does an HRCC manager need to consider and what principles or steps should be followed to implement an effective GIS in the community? What are the success factors associated with the GIS? What have been the lessons learned?
4. What measures should HRDC put in place to be able to properly measure the impacts of the GIS at a national level (i.e., rolling up from the HRCCs who deliver GIS)?
5. Are managers/designers considering making any major changes to the design, delivery and/or monitoring of the GIS? The client group focus? The number of sessions? The delivery agent? Why or why not?

1.3 Presentation of the Report

The next section of this report, Section 2.0, provides an overview of the methodology used to conduct the monitoring study research. Descriptions of the GIS studied at each of the three sites and of their outcomes, as well as issues related to rationale, design, implementation and delivery, client monitoring and follow-up processes, administrative costs, savings to the EI account, impacts on clients, and satisfaction with GIS are provided in Section 3.0. Section 4.0 provides a comparison of the three models examined. Conclusions are presented in Section 5.0 and Lessons Learned in Section 6.0.

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2. Methodology

The approach used to conduct the Monitoring Study consisted of the following components:

- document/administrative data review;
- preliminary interviews with key informants;
- site visits; and

- follow-up research.

2.1 Document/Administrative Data Review

We began by familiarising ourselves with documents detailing the GIS, their rationale and how they fit in the scope of the changes brought about by the EI Legislation. We also collected and reviewed documents and data provided by each of the sites.

2.2 Preliminary Interviews with Key Informants

Preliminary interviews with key informants at the national and regional levels were conducted. The main purpose of these interviews was to obtain information related to the rationale and early design of the GIS. Exhibit 2, presents the list of the preliminary interviews which were conducted. We also conducted informal interviews with Ken McDonald, Assistant Chief, I&C, from Nova Scotia and Joe Besson, a Regional I&C Officer in New Brunswick, to discuss issues of concern regarding the potential implementation of the GIS in the Atlantic Region.

Exhibit 2

Preliminary Interviews

#	Name	Title
1	Sue Pitts	Director, Investigation & Control Operations, NHQ
2	Rainer Bloess	Control Operations, I&C, NHQ
3	Jacques Desmarais	Operational Policy, I&C, NHQ
4	Barry Rhein	Regional Chief, I&C, Alberta Region
5	Ken Byrne	Regional Director, I&C, Ontario Region

2.3 Site Visits

We observed GIS at each of the sites visited (i.e., Lethbridge, Mississauga and York). Observing the GIS allowed team members to assess whether delivery style appeared to have any impact on the GIS models studied. Attending the GIS also allowed the consultants to better understand and contextualise the comments made later by focus

group participants and interviewees. Through post-visit comparisons, we have attempted to determine whether there were differences in the way the GIS were received by participants based on factors such as deliverer, participant profile and approach used to deliver the GIS.

As part of the observation, GIS participants were asked to take a few minutes at the end of the session to complete a brief exit questionnaire. The exit questionnaire focused on participants' satisfaction with the content and delivery of the GIS as well as the message they received from the session.

During each site visit, three focus groups were conducted with GIS participants as well as one focus group with individuals who had not participated in a GIS. The focus groups with GIS participants were held to assess issues related to the perceived usefulness of the GIS, participant satisfaction and behavioural changes as a result of the GIS. The focus group with non-participants was held, in part, to determine whether there were major differences in reported behaviour and attitude towards finding and keeping employment between GIS participants and non-participants, and the extent to which these differences could be attributed to attending a GIS. In addition to the focus groups with GIS participants and non-participants, a group discussion was also held with the local GIS design and delivery team. The purpose of this discussion was to discuss issues related to GIS design and delivery as well as lessons learned and suggested improvements.

Interviews were conducted with the HRCC Manager and/or the third-party deliverer, as well as other key GIS personnel at each site. The purpose of these interviews was to address issues related to rationale, design, implementation and delivery, satisfaction, client monitoring and follow-up, and the accountability framework. Lessons learned were also discussed.

Lastly, follow-up research was conducted by telephone upon return from the site visits. The follow-up research was conducted to clarify some issues and complete missing information. This follow-up research involved individuals who had been interviewed while on site.

2.4 Limitations of the Methodology

There were some limitations to the methodology used to conduct this monitoring study of the GIS. These limitations include the following:

- Although survey questionnaires were administered to focus group and GIS participants, the results from these surveys should not be taken to be statistically sound. The sample size of clients is the main limitation. This "quasitative" research was used to add quantitative information to the more qualitative

research;

- We were only able to observe one GIS at each of the sites. Potential variations in the respective sessions (such as by deliverer, location and client attitudes) are therefore not reflected in this report; and

- Each site examined has its own data collection method and way to calculate savings. While we have made efforts to make the presentation of the data as consistent between sites as possible, the reader should keep these differences in mind when reviewing the figures presented in this report.

3. Site Assessments

This section presents an assessment of the GIS model examined at each of the three sites researched (Lethbridge, Mississauga and York). Each of the three sites examined has chosen to implement a different GIS model. Details on each of these models, as well as the findings related to the study issues presented in Exhibit 1, are presented in this section. It is expected that the site assessments presented in this section might help HRCs interested in implementing and delivering GIS to learn from these sites and use the information during the development, implementation and delivery of their own GIS. Lessons Learned are also summarised in Section 6, which includes a guide to the implementation of a GIS.

3.1 Lethbridge

The Lethbridge Canada Alberta Service Centre (CASC) has been conducting GIS since 1995. The GIS studied in Lethbridge is called an Investigation and Control Group Information Session (I&C GIS). The I&C GIS are delivered by I&C staff to regular (Type 2) clients in their fifth to eighth week on claim. The sessions last approximately 45 minutes and are delivered to an average of 20 claimants at a time. Two sessions are held every week at the Lethbridge CASC.

Two variations of the I&C GIS, not researched as part of this study, are offered by the Lethbridge CASC. The first, the rural I&C GIS, is very similar to the I&C GIS offered at the Lethbridge CASC. The other variation on the GIS, the Programs and Services GIS, was introduced to inform clients in a consistent manner about the programs and services available to help them find employment. The session also touches on EI rights and obligations.

3.1.1 Rationale

The I&C GIS was developed for the following reasons:

- **to address the need to educate clients**. Staff wanted to inform clients about common mistakes/questions (e.g. incomplete applications, cards sent too early, unsigned cards) and show them how to address them. They also wanted to inform clients about changes to the programs and services, and to the legislation;

- **to increase the rate of intervention**. The time required to conduct one-on-one interviews limited the number of claimants whom investigators could meet. I&C staff wanted to talk to as many claimants as possible because they believed it increased the rate of detection and deterrence of abuse and fraud of the EI system;

- **to develop a tool that could be used by investigators to achieve savings**. The GIS was designed to identify potential abuse or fraud cases in order to achieve savings under the 50/250 initiative[2];

- **to send a clear and consistent message**. The GIS was developed in order to send a clear message delivered to clients in a consistent way. It was believed that standardising the information would help in appeal cases; and

- **to improve client perceptions of I&C staff**. One of the expected impacts of the GIS was for clients to perceive I&C staff as educators instead of as enforcers only.

The related objectives of the GIS are the following:

- increase the intervention rate of claimants;

- identify potential abuse or fraud cases; and

- educate clients on their EI rights and obligations.

The Lethbridge CASC saw the GIS as an efficient means of informing claimants while creating savings for the EI account, although targets for these savings were not identified.

3.1.2 Design

The design of the Lethbridge GIS was led by local I&C staff. In 1990,

staff in the Medicine Hat office had already introduced a GIS that had been developed by identifying the areas in which clients needed to be educated as well as those in which fraud was occurring. The Lethbridge staff used the Medicine Hat model and built on it by adding local statistics and flavour. In retrospect, it was felt that it would have been beneficial to involve Employment staff in the design of the GIS. This would have allowed the delivers (I&C staff) to be more knowledgeable about the programs and services available from HRDC to help clients in their employment search, which is a topic incorporated in the Lethbridge GIS.

3.1.3 Implementation and Delivery

Lethbridge initially targeted specific groups of clients (e.g., those in high demand occupations, in specific professions) to participate in the GIS. However, pressure and negative feedback from union representatives, politicians, the media, the public and claimants led to the sessions eventually being delivered to all regular claimants. Some of the challenges that Lethbridge had to deal with when it first implemented the I&C GIS, in 1995, included finding deliverers with the right skills, dealing with and managing hostile clients, and issues related to the facility where the GIS was delivered (i.e. room not big enough, need to re-arrange chairs and tables at each session).

Eligible claimants (i.e., those with an active file in their sixth to eighth week on claim) are directed to attend a GIS through a "Notice to Report" letter, sent ten days to two weeks before the scheduled session. The letter clearly states that failure to attend the GIS "may result in a suspension or denial of benefits." Focus group participants found the tone of the Notice to Report letter threatening. They reported being scared and confused about why they were being requested to report for a GIS. They suggested that by including the session agenda with the letter, claimants would have a better idea of what to expect at the session and therefore feel less threatened.

The Lethbridge GIS has evolved from an informal chat with participants using no presentation material to a 45-minute presentation using overheads. A video on rights and obligations used to be presented to participants but this was stopped because the video was not updated following the changes that were made to the Legislation. Staff and claimants reported that they would like the re-introduction of a video to the GIS. For the deliverers, a video would reduce the monotony of delivering the same information to clients session after session.

A 45-minute presentation was deemed appropriate by both deliverers and participants. Staff said that a session longer than an hour would limit the capacity of participants to take in and retain the information presented. Focus group participants agreed that the current duration

of the GIS was appropriate, but reported that they would have been open to a longer session if the format had been different (e.g., interactive workshop).

There have not been major changes in the type of information presented in the GIS over the years, which has always incorporated a strong emphasis on rights and obligations with a "zero tolerance approach." Some employment-related information, such as where to look for jobs and programs available to help claimants become re-employed, has been added to the session content and updated. The changes in the Legislation have also brought about some revisions. Although the GIS script is flexible and can easily be revised, a conscientious effort has been made not to tailor the sessions to the type of participants, given the importance of consistency.

A list of potential sources of job leads is given to each participant at the session to help them access the "hidden market." At the end of the session, participants are asked to complete an action plan, which consists of a short questionnaire asking participants to identify the actions they plan to take to look for employment and whether they need any help in putting a plan together. This questionnaire is collected at the end of the session. If a client indicates that he/she would like assistance, the questionnaire is given to Employment Services staff, who contact the client and provide the relevant advice.

3.1.4 Client Monitoring and Follow-Up

Attendance is mandatory for all claimants who have been sent a Notice to Report letter. Participants are asked to show two pieces of identification at the start of the GIS. An availability questionnaire and a job search record are included with the Notice to Report letter, which claimants are asked to bring to the session. The questionnaire and record are checked by one I&C staff while the other presents the information to participants.

It should be mentioned that the I&C GIS, especially the follow-up of directed clients who do not attend, generates a certain level of work, something of which an HRCC interested in implementing a similar GIS should be aware. In Lethbridge, the responsible I&C officer determines who FTR and ensures that they have not called to cancel or reschedule. A temporary stop payment is imposed on claimants who have not contacted the HRCC (the stop payment does not contribute to savings) and makes three attempts to contact them. If these contact attempts prove unsuccessful, a disentitlement or disqualification (D&D) is imposed. Investigators interview the claimants whom they can contact to find out why they FTR. Claimants who provide a valid reason are rescheduled. Those who don't are asked to come in for a one-on-one interview, which could result in a disentitlement or disqualification.

Follow-up is also conducted on participants for whom it is felt that there is cause for investigation (e.g., questions about their availability or their job search efforts). These claimants are invited to a one-on-one interview with an I&C officer to help them address the issues which resulted in the investigation (e.g., help them identify how they can increase their job search efforts) and make sure they understand the consequences of not addressing these issues. These investigations could also result in the imposition of a D&D.

Exhibit 3, shows the annual number of claimants directed to attend I&C GIS in Lethbridge, the number of D15s imposed (disentitlements due to FTR) and calculated FTR rates. Because the number of FTR claimants was not available, a FTR rate was approximated using the number of D15s imposed.

Exhibit 3

Attendance Information, Lethbridge

Years	Number of Claimants Directed to the GIS	Number of Claimants who Attended a Session	Number of D15s Imposed	FTR Rate[4]
1995/96	1,198	901	297	25%
1996/97	1,581	1,254	327	21%
1997/98 (April to December)	1,218	1,126	92	8%[5]

Exhibit 4, shows the number of claimants directed to attend the I&C GIS and the resulting disentitlements.

Exhibit 4

Number of Claimants Directed to GIS and Resulting Disentitlements, Lethbridge

Years	Number of Claimants Directed to Attend the GIS	Number of Resulting Disentitlements (% of Directed)
1995/1996	1,198	533 (44%)

1995/1996	1,198	333 (44%)
1996/97	1,581	667 (42%)
1997/98 (April to December)	1,218	355 (29%)

Lethbridge data for fiscal year (FY) 1995/96 and 1996/97 show that the disentitlement rate approximates 40%.

3.1.5 Administrative Costs

This section presents the *estimated* cost of delivering the I&C GIS. It is important to stress that these costs were estimated since Lethbridge does not keep track of them.

Exhibit 5, breaks down the estimated cost to operate a GIS in Lethbridge, excluding any overhead costs such as facility and office equipment.

Exhibit 5

Cost Estimates for Delivering the GIS - 1997-98, Lethbridge

Number of Staff	Pay Level	Percentage of Time Spent on GIS	Estimated Operational Cost
1	$44,000	5%	$2,200
2	$40,000	10%	$8,000
2	$35,000	90%	$63,000
1	$28,000	25%	$7,000
Total Operation Cost			**$80,200**
Fixed annual cost (e.g., mailing, some travel)			$1,000
Total Cost			**$81,200**
Estimated Cost per Scheduled Client (assuming a total of 1,624 scheduled clients for FY 1997-98)			**$50**

The estimated 1997/98 annual operational cost for operating the GIS is $81,200. A total of 1,218 clients were scheduled to attend an I&C GIS from April to December 1997. By extrapolating and assuming the same number of participants are scheduled each month, it can be estimated that a total of 1,624 clients will be scheduled for the 1997/98 Fiscal Year. Therefore the GIS-related cost per scheduled client can be estimated at $50.

3.1.6 Savings to the EI Account

Lethbridge uses a local system called Investigations and Control Performance Data Analysis (ICPDA) to track savings and performance measures for I&C staff. However, NHQ captures savings data through a national system, and there exist discrepancies between the information provided by the two systems, due to a number of reasons.

The figures presented in this section are those captured through the local system. As seen in Exhibit 6, indirect savings make up the majority of total GIS savings (96% in FY 1997/98, up to December). From April to the end of December, 1997, Lethbridge achieved gross GIS-related savings of $1,272,709.

Exhibit 6

Lethbridge Gross Savings

Year	Direct Savings	Indirect Savings	Gross Savings
1995/96	$12,910	$1,349,147	$1,362,057
1996/97	$33,908	$1,923,495	$1,957,403
Year-to-Date 1997/98 (up to December 31, 1997)	$46,924	$1,225,785	$1,272,709

The operation cost of the GIS for the 1997-98 FY, up to December 31, was calculated for nine months (multiplied by 9/12), the same period as for the gross savings figures. Over this period, net savings have been estimated at $1,211,809. The net savings per scheduled client are $995.

Exhibit 7, provides a summary of the information on the I&C GIS in the Lethbridge Region.

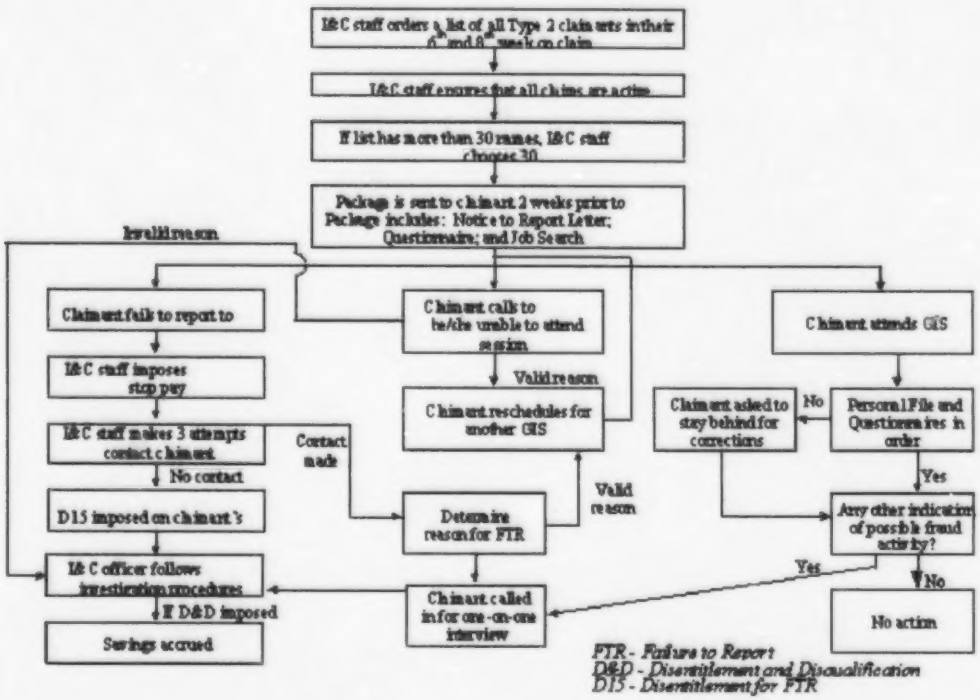
Exhibit 7

Data Summary Table, Lethbridge

Attribute	April to December 1997
Number of Scheduled Clients	1,218
Number of D&Ds	355
Cost	
Total Operational Cost	$60,900
Operational Cost per Scheduled Client	$50
Gross Savings	
Direct Savings	$46,924
Indirect Savings	$1,225,785
Total Gross Savings	$1,272,709
Gross Savings per Scheduled Client	$1,045
Gross Savings per D&D	$3,585
Net Savings	
Total Net Savings	$1,211,809
Net Savings per Scheduled Client	$995
Net Savings per D&D	$3,414

Lethbridge staff feel they could not have achieved net savings of this extent without the GIS initiative. The GIS have allowed them to increase their rate of intervention by seeing a larger number of claimants, and therefore identify a greater number of cases which presented cause for investigation, than would have been the case otherwise.

Graph 8


I&C staff orders a list of all Type 2 claimants in their 6th and 8th week on claim
I&C staff ensures that all claims are active
If list has more than 30 names, I&C staff chooses 30
Package is sent to claimant 2 weeks prior to Package includes: Notice to Report Letter; Questionnaire; and Job Search
Invalid reason
Claimant fails to report to
I&C staff imposes stop pay
I&C staff makes 3 attempts contact claimant
No contact
D15 imposed on claimant's
I & C officer follows investigation procedures
If D&D imposed
Savings accrued
Contact made
Claimant calls to he/she unable to attend session
Valid reason
Claimant reschedules for another CIS
Determine reason for FTR
Valid reason
Claimant called in for one-on-one interview
Claimant attends CIS
Claimant asked to stay behind for corrections
No
Personal File and Questionnaires in order
Yes
Any other indication of possible fraud activity?
Yes
No
No action
FTR - Failure to Report
D&D - Disentitlement and Disqualification
D15 - Disentitlement for FTR

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Canada

The Lethbridge GIS process is illustrated in the flow chart in Exhibit 8.

Exhibit 8

Procedures for GIS in Lethbridge, Alberta

View Graph

3.1.7 Impacts on Clients

Participants in the I&C GIS which was observed by Price Waterhouse were administered an exit questionnaire. The questionnaire included questions on perceived usefulness of, and satisfaction with, the session participants had just attended.

Not surprisingly, the greatest impact of the observed session on clients was seen in the area of awareness of EI rights and obligations. Two-thirds of participants (66%) agreed that the session gave them a better understanding of their EI rights and obligations. Focus group participants also reported feeling better informed about their EI rights and obligations after attending the I&C GIS. Approximately 54% of participants also thought the session was useful and informative.

However, 64% of participants said that the session had not changed their views on maintaining employment.

The perceived usefulness of the session varied among focus group participants. Some found it very informative whereas others thought the information was a duplication of the rights and obligations fact sheet, and the rights and obligations information presented at the Programs and Services GIS. The perceived usefulness of the session appeared to depend on how much participants already knew about EI. For example, first-time claimants reported learning a lot and appreciated that I&C had taken the time to explain EI to them directly. The following information was especially appreciated: job postings on the Internet; clear definition of what is allowed and what is not allowed while on claim; and the programs and services available to help them become re-employed.

Many of the claimants said that their primary concern after attending

the session was to ensure that their forms were completed correctly. They feared the repercussions of completing them inaccurately. When asked to identify the purpose of the I&C GIS, the most common answer was "to provide information to claimants". However, intimidation and to "check up on people" were also mentioned by at least a few claimants in all the focus groups conducted in Lethbridge.

Some focus group participants said that the session may have motivated them to look for work, but did not necessarily feel this was positive motivation since this motivation was in part based on fear. Some felt they were expected to take any job, even a job below their skill and pay level, or risk losing their benefits. Some felt the session served to "discourage" and make them "feel more vulnerable" about being unemployed. The majority felt that the session did not alter their method of searching for work.

Price Waterhouse conducted pre-focus group surveys with GIS participants and non-participants. During the focus group, it was discovered that the majority of the non-I&C participants had attended a Programs and Services GIS. The reader should therefore bear in mind that non-participants means that they did not participate in the I&C GIS, while they could have participated in the Programs and Services GIS.

The results of the pre-focus group survey show the following similarities between participants and non-participants[c]:

- the majority of participants in the two groups agreed that they had the right skills to look for a job;
- the majority of participants in both groups agreed they knew their EI rights and responsibilities (interestingly, almost the same percentage of participants (27%) and non-participants (28%) disagreed with this statement);
- both groups agreed they knew where to obtain information on their EI rights and responsibilities;
- both groups agreed they knew where to obtain information about services to help them find a job; and
- both groups generally agreed they liked going to work.

The survey pointed out the following differences between the two groups:

- only 17% of GIS participants felt that there were no jobs available, compared to 57% of non-participants;

- a larger proportion of GIS participants (79%) than non-participants (43%) knew what services were available to help them find jobs; and

- a larger proportion of non-participants (86%) felt that being unemployed was the worst thing they could think of, compared to 48% of participants.

The differences of the two groups indicate that the GIS might have the following impacts on clients:

- helping clients better understand what services are available to help them find jobs;

- presenting labour market information to clients and informing them about the hidden job market, and thereby making participants feel more optimistic about the availability of jobs; and

- helping clients realise that they are not alone in their situation.

3.1.8 Satisfaction with the GIS

The Lethbridge CASC staff interviewed in the context of this study reported being very satisfied with the GIS. They agreed that the sessions are educating clients and providing them with an opportunity to ask questions. Deliverers also reported feeling a sense of accomplishment when they guide a claimant back on the re-employment track and/or when savings are realised. They felt that the GIS are a more efficient means to achieve savings than one-on-one interviews. Staff were also very satisfied with the savings that have resulted from the GIS. After 3 years of conducting the sessions, the Lethbridge CASC has reportedly experienced a reduction of one-third in the number of education workers applying for EI during the summer months.

There are currently no direct feedback mechanisms in place for clients to comment on the GIS. Feedback is by word of mouth or anecdotal. Some believe that clients would be afraid to provide feedback for fear of repercussions.

As mentioned previously, participants of the I&C GIS which we observed were asked to complete a short exit questionnaire. The survey results show that participants were highly satisfied with the session overall. There was agreement among survey participants and focus group participants on some aspects of the session. The location, the time, the language, and the length of the session were generally satisfactory to both groups. Focus group participants were less

satisfied with other aspects of the session than those responding to the exit questionnaire. Possible reasons for the difference in opinions between focus group participants and exit questionnaire respondents include the following:

- the elapsed time after the session may be a contributing factor. Participants might be highly satisfied immediately after the session (the time the exit questionnaire was administered) but by the time they have had a chance to reflect on the session (a few months later), they feel less satisfied; and

- exit questionnaire respondents may have felt intimidated completing the questionnaire with the I&C officers still in the room.

Some focus group participants found the session to be an important and satisfactory means of conveying the information to claimants, but felt the positive aspects of the sessions were overshadowed by the negatives. Almost all focus group participants agreed that the session had threatening undertones. The I&C staff member collecting the forms and reviewing the files at the back of the room was sometimes viewed as more intimidating than the deliverer. Participants found it especially intimidating when names were called at the end of the session and told that they either had to stay behind (e.g., files were missing information, there were questions about their availability or job search) or could leave. Participants suggested asking everybody to stay behind, to call clients back at a later date, or to review files in another room.

Participants also felt that they were already considered guilty of fraudulent use of EI and felt this was how they were treated during the session. However, the majority of clients were satisfied with the deliverer's ability to answer their questions. They also mentioned that the session deliverer was very thorough in imparting the information. "They didn't leave any gray areas...you knew exactly where you stood."

Although the deliverer invites claimants to ask any questions, they find there are very few questions asked during the sessions. Deliverers believe that the clients don't ask questions because they feel fearful and defensive: "If I ask this question, is it going to make them suspicious of my activities?" Clients expressed the same view. Some clients said they did not ask questions because the deliverer was rushed and just wanted to get the session over with as fast as possible. "The less questions the better, so they can get you out of there." The majority of claimants wait until the end of the presentation and ask questions of a staff member on a one-on-one basis. Focus group participants said they would like more interaction in the session, suggesting that this approach could even change the atmosphere of the session from

threatening to supportive.

During the focus group, participants were asked to give suggestions and ideas of how to improve the GIS. They provided the following suggestions:

- invite a client that has used the service (e.g., job finding club) to speak during the GIS in order to motivate others. Clients may relate better to someone who has been unemployed and "was one of them" than to the deliverer who they see as a public service employee;

- there should be separate sessions for repeat and first time users of EI. A person who is unfamiliar with the EI system is better informed and satisfied with the current GIS, whereas the person who goes on EI every year (due to seasonal work) already knows the rules and regulations. These claimants would be better served with a session concentrating on re-employment skills such as interviewing skills workshops or a career directions workshop;

- provide more information on training courses, one-on-one counseling, emotional aspects of job searching, and job searching skills;

- incorporate more interaction into the session. Participants felt that smaller groups would be more intimate and interactive. Claimants expressed a desire for smaller sessions so they could ask questions without making the session too lengthy;

- select clients according to employment sectors in which claimants are seeking jobs to better meet the needs of the group;

- communicating the objectives of the session ahead of time would be helpful. The claimants would all have the same expectations and feel more confident knowing exactly what the session would cover. One participant noted that, most of the time, "satisfaction is based on expectations";

- have a question box available to claimants who are too shy to ask questions so that questions can be asked anonymously. This could also decrease the fear of repercussions; and

- hold sessions earlier in the claim before claimants become discouraged.

3.1.9 Objective Achievement

The GIS in Lethbridge have generally achieved their objectives. The

first objective was to educate clients. From the questionnaire results, it appears that clients who have attended a GIS are more aware of the services available to help them find employment than claimants who have not attended a GIS (79% participants vs 49% of non-participants were aware). However, both groups felt that they knew their EI rights and obligations.

Another objective was to increase the rate of intervention of claimants. GIS have allowed I&C staff to see over a thousand clients a year for the past three years. As for achieving savings, GIS has accrued a net savings of over a million dollars a year in direct and indirect savings since its inception.

3.2 Mississauga

The GIS studied in Mississauga is called a Booster Session. Booster Sessions were introduced as a full-time HRDC program in the Peel-Halton-Dufferin (PHD) management area, of which Mississauga is part, in the 1995-96 FY, following a 3-month trial period that was initiated in November 1994. Booster Sessions are delivered to clients in their eighth to tenth week on claim. The sessions are delivered at the Work Web (an employment resource centre) and typically involve anywhere between 10 and 20 participants. The sessions were designed and are delivered by a third-party contractor, the Quality and Continuous Improvement Centre (QCIC). The HRCC chose third-party delivery in part to address resource issues at the HRC level but also, importantly, because of the positive feedback received from clients on the third-party facilitators and of internal staff's own observation of the sessions. It was also stated (by both QCIC staff and others) that because the third-party deliverer is very involved in the employer community, their statements may bear more weight and be taken more seriously by participants than if HRDC staff were making the same statements.

Two other forms of GIS, not researched in the context of this study, are also delivered in Mississauga by the third-party deliverer. Jump Start sessions are delivered at zero to three weeks into a client's claim. They provide information to clients on their EI rights and obligations, which is delivered by the third-party according to a script developed by the HRCC. The other form of GIS delivered by the third-party in Mississauga is called Shifting Gears, first introduced in the summer of 1997. These sessions are specifically targeted at unemployed workers in the education field (ranging from teachers to cafeteria workers to school bus drivers).

3.2.1 Rationale

The rationale for the Booster Sessions delivered in Mississauga was very much driven by the needs of unemployed people. These needs

were identified in the context of the research conducted for a Master's Thesis in Adult Education which was being completed by one of the Executive Directors of the organisation that would become the third-party deliverer for the Booster Sessions. Through this research, it was found that unemployed individuals in their eighth to twelfth week on Unemployment Insurance were experiencing a low point in their search for employment and needed a "boost" that would motivate them to keep looking for a job. The research also identified a need for a number of these people to acquire a better understanding of the labour market, job search techniques, and programs and services available to assist them in their job search.

The objectives of the Booster Sessions are broadly defined as the following:

- motivate clients to keep looking for work, or renew their efforts in that direction; and
- provide them with the information that will allow them to improve their confidence levels and make their job search as effective as possible.

While the achievement of savings was not initially a consideration in the implementation of Booster Session, they are nonetheless an outcome of the sessions, as will be examined in Section 3.2.6.

3.2.2 Design

The HRCC was not involved in the design process of the Booster Sessions in Mississauga. The third-party organisation that submitted a proposal for the sessions were responsible for their design and, eventually, delivery. However, since then, the HRDC internal Booster coordinator has been working in cooperation with this third-party organisation to identify adjustments or modifications.

3.2.3 Implementation and Delivery

Similarly to Lethbridge, Mississauga also started out delivering Booster Sessions to specific groups of clients (e.g., those who did take advantage of available follow-up services after attending an initial information session). The target group was eventually extended to all Type 2 clients in their eighth to tenth week on claim because the sessions are seen as being potentially beneficial to all unemployed people at this point in the unemployment cycle.

Clients in their eighth to tenth week on claim are directed to attend a Booster Session through a letter that states very clearly that failure to attend without proof of good cause could result in disqualification or disentitlement to EI benefits. Because the letter is proof that clients

have been directed to attend, and must hold under appeal if a client is disentitled as a result of failing to attend a Booster session, it must not leave any room for confusion or ambiguity (e.g., timing must be clearly stated).

The tone of the letter was often identified as an irritant by focus group participants. They mentioned that while the session had been a positive experience, they had expected it to be boring because of the way the letter was worded. While participants acknowledged that a more softly-worded letter would probably be ignored by the majority of people, some suggested that more information on the session (e.g., agenda) could be included so as to reduce their anxiety concerning the session.

While there were no major challenges experienced early in the implementation of the Booster Sessions, fragmentation of the coordination of activities was identified as an issue (e.g., each participating responsibility centre in the PHD area using different procedures and methods to schedule, cancel and capture the results of sessions and delivering them). This issue has been addressed in part since all sessions are now delivered by a third-party organisation and a number of activities have been centralised within the Brampton HRCC (e.g., scheduling of sessions, capturing results, and handling cancellations from participants).

The Mississauga Booster Sessions are delivered at the Work Web, a job search and career planning centre. While the Booster Sessions were originally delivered to homogeneous groups (in terms of occupational background) that could include one hundred people, the sessions delivered today are smaller (10 to 20 participants) and involve a mix of participants. The current size of the groups was considered acceptable but it was felt that sizes of approximately 25 participants were the most cost-effective while remaining manageable. Furthermore, it was felt that assembling participants from a mix of occupational backgrounds would make it less conducive to having them all band together in a hostile showdown with the facilitators.

Since March of 1996, a new emphasis on personal responsibility and lifelong learning has been incorporated into the sessions. "We used to spend a lot of time telling people which person they should see for the program that they wanted, telling them about how to get approval for, say, training, the Self-Employment Assistance (SEA) program. We used to cover all the rules around programs. Now, we talk more about employability skills." While the basic content currently remains the same from session to session, individual sessions might be adapted to the needs and issues that participants want addressed. Participants in the Mississauga Booster Sessions are asked to actively participate in the session and in group exercises, and facilitators interact with the participants throughout the day.

At the beginning of any Booster Session, participants are asked to complete a Client Information Form, kept on file at QCIC in case relevant job opportunities arise, and an HRDC Participant Information Referral Form, which is used for the purpose of reaching participants for HRDC future surveys. The introduction is followed by a series of individual and group exercises with various objectives. For example, one exercise led to a discussion on the new realities of the labour market (e.g., more contract work, downsizing) and the conclusion that "we need to understand that change is here to stay." Rights and Obligations are discussed very briefly. A tour of the Work Web, which includes a presentation of the resources available there, is included in the Booster Session.

At the end of the Booster Session, participants are asked to complete a Personal Development Plan (PDP). Among other things, the plan asks participants to identify the obstacles which they feel are preventing them from finding employment, which programs or ideas discussed in the session they feel they could use to help them deal with barriers and which, if any, of a list of job search strategies or programs they would consider using. The last section of the plan is an open-ended question period that provides an opportunity for clients to make comments on the session. The plan is used to conduct a telephone follow-up of participants four weeks after the session.

3.2.4 Client Monitoring and Follow-Up

Attendance is taken at the beginning of the Booster Sessions. Participants are asked to show two pieces of identity to attest that they are the clients who have been directed to participate. The list of attendees is sent to the Brampton HRCC (the centre responsible for the coordination of the GIS) at the end of each session. Cancelled (CAN) FTR participants are then referred to an I&C officer, who is charged with assessing the reason for the CAN or FTR. Those absent without good cause may be disentitled from receiving additional benefits. Exhibits 9 and 10, show the number of clients who were directed to attend a session, attended, CAN and FTR for the FY 1997-98 as well as the disentitlements resulting from cancellations and failures to report for FY 1997-98 (up to December).

Exhibit 9

Attendance Information, Mississauga

Year	Directed-to-Attend	Attended (% of Directed)	Cancelled (% of Directed)	Failed to report (% of Directed)

April to December 1997	5,919	3,005 (51%)	1,388 (23%)	1,164 (20%)

*Note: The sum of Attended, Cancelled and Failed to Report do not add up to the number of Directed-to-Attend because of missing information for Cancelled and Failed-to-Report for the month of November.

Exhibit 10

Disentitlements from Cancelled and Failed-to-Report Participants

Year	Cancelled (% of Directed)	Failed to Report (% of Directed)	D&Ds (% of CANs and FTRs)
April to December 1997	1,388 (23%)	1,164 (20%)	582 (23%)

Note: The disentitlement rate might be underreported since information was missing for the month of November.

Of the three sites studied, Mississauga is the only location where follow-up of participants that is unrelated to investigations takes place. QCIC conducts a telephone survey of participants four weeks after the session, which is based on the Personal Development Plan completed by each participant at the end of the session. Using QCIC's monthly reports, the HRDC electronic files of clients who reported to QCIC that they had found work are checked, using the clients' SIN, to ensure that they also reported "found work" on their card. Those who did not are referred to an I&C officer. Clients who report that they were on holidays, out of the country or that they have not done anything to look for employment since the Booster Session are also referred to an I&C officer.

Clients who are followed up and report that they have not found work are asked how their job search is going and about their perceived barriers to employment, as well as the steps they have taken since the Booster Session to improve their employability or find a job. They are also provided with additional suggestions concerning how to go about their job search. QCIC makes three attempts to contact Booster participants by telephone. After three unsuccessful attempts, a letter is sent to the clients who could not be reached and an I&C officer is

assigned to them. Clients who fail to make any contact with the HRCC or investigation agent are disentitled.

The majority of clients (87% from April to December 1997) are typically contacted at the time of the follow-up. Of those, slightly less than one-fifth (16%) report that they have found work since the session. However, clients are not asked to what extent they feel that their participation in a Booster Session specifically contributed to them finding employment. Most of the focus group participants mentioned that they had been followed up by QCIC and the majority appreciated the phone call, which was reportedly quite lengthy in some cases.

3.2.5 Administrative Costs

The comment made in the section on Lethbridge concerning the calculation of cost also applies here, i.e., the costs associated with delivering the Booster Sessions, except for the cost of the contract with QCIC, are not tracked. The information on cost provided below has therefore been estimated for the last fiscal year (1997-98), and only reflects the cost incurred by the Brampton HRCC.

Exhibit 11

Approximate Cost of Running Booster Sessions

Brampton HRCC

Item	Cost
HRDC clerk salary	$25,000
HRDC officers salary	$80,000
Overheads (envelopes and postage) ($54 per 1,000)	$426[7]
Contract with QCIC (1997/98)	$261,852
Total Estimated Cost	**$367,278**
Estimated Cost per Scheduled Client (assuming a total of 7,892 scheduled clients for FY 1997-98)	**$47**

The total number of clients who would be scheduled to attend a Booster Session over a period of a year has been estimated at 7,892 (number of clients who were scheduled for the period of April to

December 1997, extrapolated to twelve months). Based on these calculations, the average cost per scheduled client of delivering Booster Sessions would therefore be $47.

3.2.6 Savings to the EI Account

As elsewhere, overall I&C savings are captured by entering code 73 in the systems (i.e., investigations undertaken as a result of GIS). However, the systems do not provide a breakdown of the savings associated with each type of group sessions (e.g., Booster, Jump Start) delivered in the PHD management area. Therefore, the I&C manager in Brampton calculates the savings specifically associated with the Booster session by hand, which is a very labour intensive process that results in ballpark figures.

It is important to mention that the savings calculated in this way are indirect savings (i.e. money not paid out that could have been) and that only Booster savings are calculated. Furthermore, the savings calculated in this manner are gross savings at one point in time. They do not incorporate the cost of delivering the GIS and are not subsequently adjusted to reflect any changes in disentitlement, such as rescinded decisions.

Exhibit 12

GIS Gross Savings Figures, Mississauga

Year	Total Savings	Number of Scheduled Clients	Savings per Scheduled Client	Number of D&D	Savings per D&D
April to December 1997	$1,572,298	5,919	$266	582	$2,702

Total savings for FY 1997-98 were in the amount of $1,572,298. The corresponding average savings are $266 per scheduled client and $2,702 per D&D. The information is presented in Exhibit 12.

While the calculations done by hand by the Brampton HRCC manager are gross savings, we can use the estimated cost of coordinating and delivering the Booster Sessions to determine net savings. As seen in section 3.2.5, the estimated annual cost related to Booster Sessions is $367,278. Extrapolated over a 9-month period (April to December 1997), estimated costs would be $275,459. Subtracting these costs from the savings for the same nine month period ($1,572,298), we obtain a net savings figure of $1,296,839.

Exhibit 13, summarises the cost and savings figures for FY 1997-98 (up to December). It should be stressed that the figures presented in this exhibit are approximate numbers based on the information made available to us.

Because the HRCCs in the PHD area do not conduct many one-on-one activities with clients, it was felt that they would not be "anywhere near" where they are in terms of savings if not for the Booster Sessions (and other types of group sessions). A document provided to us during our site visit (untitled) states that "Booster is responsible for uncovering a multitude of non-compliance, misrepresentation, non-availability, not employed, not capable issues that likely would not have come to light without this intervention."

Exhibit 13

Summary of Cost and Savings Information,

April to December 1997

Attribute	Values
Total Number of Scheduled Clients	5,919
Total Number of D&Ds	582
Cost	
Total Operational Cost (Estimated)	$275,459
Operational Cost per Scheduled Client	$47
Gross Savings	
Total Gross Savings, 1996/97 FY	$1,572,298*
Gross Savings per Scheduled Client	$266
Gross Savings per D&D	$2,702
Net Savings	
Total Net Savings (Estimated)	$1,296,839

Total Net Savings (Estimated)	$1,290,659
Net Savings per Scheduled Client	$219
Net Savings per D&D	$2,228
Note: Direct and indirect savings could not be segregated.	

The process associated with the Booster Session is presented in Exhibit 14.

3.2.7 Impacts on Clients

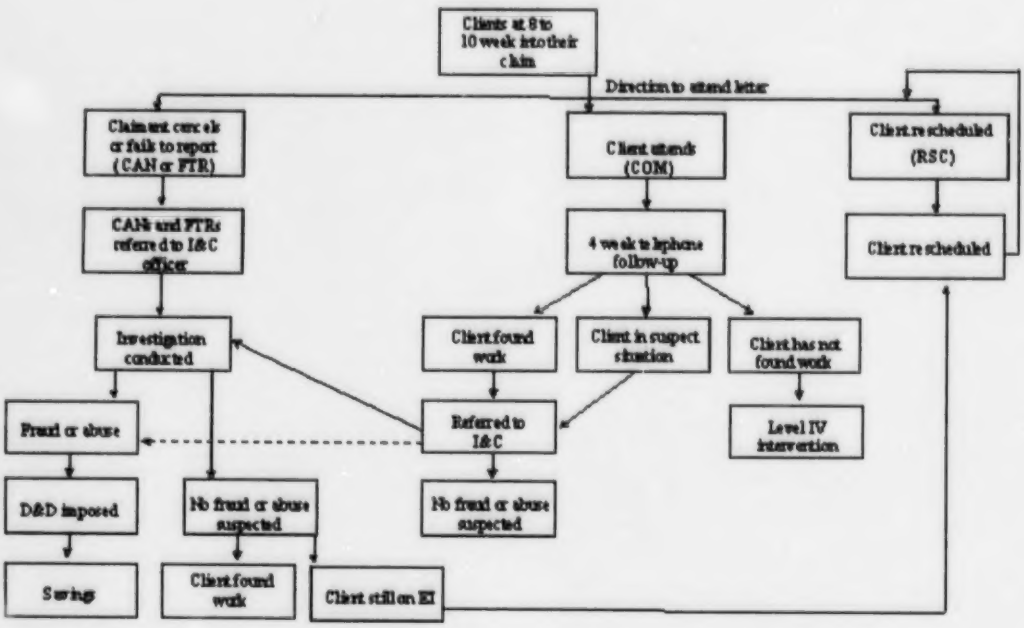
The results from the post-Booster Session survey indicate that the major impacts of the Booster Sessions for the group of participants surveyed revolved around the information they obtained on the services available to help them find a job (four-fifths of respondents reported that they have a better idea of where to go to obtain the information and three-quarters said that the session informed them about the services available). As one focus group participant said, "They may not have covered all the information but they did tell you where to find it." The majority of participants also agreed (in a proportion of 73%) that the session had been, generally, useful and informative.

While slightly less than two-thirds of respondents agreed that they now had a better idea of where to go to obtain information on their Employment Insurance rights and obligations, more than half also disagreed that the session itself gave them a better understanding of these rights and obligations. This is not a surprising result given that EI rights and obligations is not a topic that is specifically covered by the Booster Session. A number of participants said they had questions about their rights and obligations or felt unsure of what they were (e.g., amount that can be earned while on claim, how to handle vacation time). One participant mentioned, "I have a lot of questions about my rights but can't find the right person to ask." However, participants who had attended a Jump Start Session usually reported being well aware of their EI rights and obligations.

Exhibit 14

Booster Process

Graph 14


Clients at 8 to 10 week into their claim
Direction to attend letter
Claimant cancels or fails to report (CAN or FTR)
Client attends (COM)
Client rescheduled (RSC)
CANs and FTRs referred to I&C officer
4 week telephone follow-up
Client rescheduled
Investigation conducted
Client found work
Client in suspect situation
Client has not found work
Fraud or abuse
Referred to I&C
Level IV intervention
D&D imposed
No fraud or abuse suspected
No fraud or abuse suspected
Savings
Client found work
Client still on EI

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A number of focus group participants mentioned that they had been accessing new avenues and services to look for employment since attending the Booster Session. Although comparisons with participants in the focus group with clients who did not attend a Booster Session are difficult to make (because of the small number of participants in that focus group), these participants generally seemed less aware of the various avenues and possibilities open to them in their search for employment (e.g., none of them knew about the resources available at the Work Web) than were participants who had attended a Booster Session. Other focus group participants mentioned changing their resume as a result of the information they got from the Booster Session. Some reported that as a result of attending a Booster Session, they were now considering contract work. One participant mentioned, "It is not so alien anymore" and another, "You have to accept that jobs will not be long term. Contracts are a reality."

One of the major impacts of the Booster Sessions was on participants' morale, self-esteem and self-confidence. The majority of focus group participants confirmed that the Booster Session had given them a lift that made them feel better about themselves and renewed their motivation in their job search. One participant mentioned, "I phoned a day care centre I really liked and pushed my way to a job: that's what they taught us." For participants who were already feeling motivated, the session also provided the group support that made them realise that they were not the only ones in their position, which strengthened the positive feeling they got out of the session. While the good feelings that the Session gave participants were viewed positively by the majority of focus group participants, a few mentioned that a good feeling was all they got out of the session. One focus group participant commented that, "The only problem is that none of us have got jobs."

3.2.8 Satisfaction with the GIS

The majority of stakeholders involved with the Booster Sessions were quite satisfied with the sessions. At the HRCC level, it was felt that Booster Sessions were an effective way to help clients get motivated and achieve savings. Despite the savings achieved, the I&C manager interviewed stressed the fact that the Booster Sessions were viewed as first and foremost employment - not control - measures. She felt this message had to be communicated on an ongoing basis to overcome

the perception that "I&C is out to get people." The sessions were also reported by the manager as being the most positive interaction the HRCCs have ever had with their clients. There was also a high level of satisfaction with the partnership established with the third-party delivering the sessions and the willingness of this third-party to work in collaboration with the HRCC. QCIC also agreed and were satisfied that they were now working in true partnership with HRDC (apparently, there was friction in the early days of the partnership caused by the contracting out of service delivery to a third-party).

Results from the exit questionnaire indicate that the aspects of the sessions which met with the greatest level of satisfaction were "the attitude of the session facilitator/instructor" and "the language in which the session was offered", followed by the "location of the session", the "tone in which the session was delivered" and the "format/structure of the session." Three-quarters of participants also expressed satisfaction with their "level of participation in the session" and the "length of the session." Areas of lesser satisfaction included the "time of the session", the "amount of information provided" and the "usefulness of the information provided." Focus group participants were generally quite satisfied with the Booster Session they had attended. Even participants who said they were already doing or were aware of what was discussed in the session tended to find it informative. Specific areas of satisfaction included the motivation that participants got out of the session as well as specific tools and approaches they could use in their job search. However, many felt disappointed that more time was not spent on reviewing their resume.

Many participants also expressed high levels of satisfaction with the facilitators (knowledgeable, outgoing and energetic, supportive) and with the part of the session spent discussing transferable skills. "The new world is you know ten different skills so that you can do ten jobs." The participants who had attended a Jump Start session tended to feel that while interesting, the Booster Session had been a duplication of Jump Start.

One aspect of the delivery that makes the Booster Sessions successful and popular with clients is that these sessions are highly interactive, with participants being provided with the opportunity to ask questions of the facilitators and participate in a variety of group and individual exercises. The facilitators are also very adept at putting clients at ease and showing support and empathy.

When asked how they would change the session, focus group participants made the following suggestions:

- spend more time discussing individual issues and problems;
- give the session sooner into clients' claims (this comment was

generally made by clients who had not attended a Jump Start Session). "I did feel better about myself when the session ended. If you do it at the beginning you have less of a chance of getting into a slump.";

- group participants with similar occupational background together, especially if one objective of the session is for people to network;

- provide more information on resume preparation (as a note, workshops on that topic are available);

- give people options about the type of session they can attend (e.g., make available the option of attending a session on starting one's own business or on contracting instead of the Booster Session); and

- provide more information on labour market trends.

3.2.9 Objective Achievement

As a reminder, the objectives of the Booster Sessions are broadly defined as the following:

- motivate clients to keep looking for work, or renew their efforts in that direction; and

- provide them with the information that will allow them to improve their confidence levels and make their job search as effective as possible.

These are very broad objectives and this section attempts to assess the extent to which they have been achieved as best as possible.

The first objective of motivating clients to keep looking for work has been achieved for a number of the clients consulted during this study. Indeed, the findings presented under the sections of impacts on and satisfaction of clients have demonstrated that one of the major impacts of the program is on participants' motivation and confidence in looking for work. A few identified key actions that they had taken subsequent to their participation in the program and that were directly related to their improved confidence in their ability to look for work. However, the Booster Sessions do not seem to have as much of a positive impact on clients who have previously attended a Jump Start session since the former is perceived to be a duplication of the latter.

The second objective is related to providing participants with the information that will make their job search as effective as possible. Again, the Booster Sessions seem to be providing participants with

useful information to make their job search more effective. Indeed, a number of focus group participants mentioned that they were using new avenues and tools with which they were not previously familiar to conduct their job search. A few participants also mentioned changing their perspective on the realities of the labour market and on the type of work they would consider doing (e.g., some were now considering contract work). Nevertheless, only 1 out of 2 respondents to the exit survey reported that they were satisfied with the usefulness of the information provided (a greater proportion were satisfied with the type and amount of the information provided). These responses could be affected by the feedback from the participants who had attended a Jump Start session who felt that the Booster Session had been a duplication of Jump Start. Nevertheless, there exists an opportunity to make the information presented at the Booster Session even more useful for participants. One way to do this would be to incorporate more information on resume writing in the session and spend time reviewing participants' resumes individually.

3.3 York

The Group Information Session studied in the York Region was first introduced in 1995. Called a Rights and Obligations Session (ROS), it is a 45 minute to one hour scripted information session designed for all regular (Type 2) Employment Insurance claimants. The Richmond Hill HRCC currently delivers three sessions a day, or up to 15 sessions per week. Clients attend the session approximately two weeks after they file for Employment Insurance.

All sessions are delivered by the HRCC's own staff. York has chosen to deliver the sessions internally as opposed to using a third-party because it feels that internal staff are in a better position to deliver accurate and consistent information, and there are fears that a third-party deliverer might provide inaccurate information to clients.

Although originally delivered at all three sites in the York Region (Richmond Hill, Newmarket and Markham), the sessions are currently only delivered at the Richmond Hill and Newmarket sites. For the purpose of this study, only the activities of the Richmond Hill HRCC are discussed. However, where figures (including attendance and savings figures) are presented, these are representative of the York Region as a whole, and are not particular to the Richmond Hill HRCC.

In addition to the regular Rights and Obligations Sessions offered by the HRCC, the York Region also delivers school-related sessions to school workers during the summer months. These school-related sessions have been delivered since 1995 to all persons who work in school-related activities and who file for Employment Insurance.

3.3.1 Rationale

In March of 1995, the HRCC launched a Client Intervention Strategy. As part of this strategy a Client Intervention Committee was established to develop and implement procedures to support the activities of the I&C Unit as part of the regional 50/250 initiative. In addition to supporting the 50/250 Initiative, the HRCC saw the establishment of the ROS as an opportunity to streamline its services to clients. The HRCC also wished to standardise the information that it delivered to clients in order to ensure that all individuals received consistent messages. The HRCC was also interested in reducing added workload resulting from incomplete or incorrectly completed cards and forms. It was felt that the ROS could also contribute to balancing staff workloads. Although staff would be given more work in the scheduling of clients for the information sessions, they would no longer need to go over rights and obligations with each client.

These factors led to the launch of the Richmond Hill HRCC's Rights and Obligation Sessions (ROS) in 1995.

Although not specifically outlined by the HRCC, the overriding objectives of the ROS, as well as associated impacts, would be best described as the following:

- to inform clients of their rights and obligations, resulting in better informed clients; and

- to inform clients of the employment services available to them, with the result of improving marketing of services and programs and a quicker return to work by claimants.

The identification of the above as the key objectives for the ROS sessions is based on a number of guiding principles and key premises used to design the sessions.

No specific cost saving goals or objectives were established for the ROS although there were expectations that the ROS would lead to savings. In addition to direct and indirect savings which might result from the sessions, there was a belief that HRCC operational costs would be reduced due to time savings associated with better informed claimants.

3.3.2 Design

In York, staff from both the I&C, and Employment units were brought together to determine the content of the session. A document called "A Guide on the Development and Delivery of Group Information Sessions", developed by Employment and Immigration Canada in 1989, together with benefit policies, group sessions already in place, and the rights and obligations outlined to clients at the time they were

filed for a claim were used as references to develop the ROS.

3.3.3 Implementation and Delivery

While the Richmond Hill HRCC considered, and even experimented with, the targeting of specific groups of clients to attend a group information session, this idea was soon abandoned because of the associated challenges encountered (e.g., difficulty communicating with the targeted clients because many did not speak English fluently). Furthermore, the premise behind the ROS that "every claimant should receive all necessary information immediately upon application for benefits" led the HRCC to target all regular clients for these sessions, excluding renewal claims.

When entering the Richmond Hill HRCC, clients meet briefly with a Client Service Representative (CSR) to file for benefits, from whom they receive a copy of the Claimant's Rights and Obligations Form and are simultaneously scheduled for an ROS. A Confirmation of Appointment form is used to direct clients to attend a session. The form includes a description of the consequences of failing to attend the session without good cause (e.g., subsequent disqualification). The form is designed to be clear and concise, and provide claimants with all the information they need to attend the session. Based on focus group findings, it appeared that the form was easily understood. Individuals appeared to have a clear understanding of the consequences of not attending the session and of how to change their scheduled attendance if required.

In Richmond Hill, weekly meetings of the Client Intervention Committee were set up from March 1995 (when the Committee was established) to May, 1995, when the ROS were first implemented, in order to get the ROS up and running. While there was no formal pilot test of the ROS, these sessions were closely monitored for approximately three months. Changes to the sessions were made as needed based on the feedback of staff and facilitators as well as informal client feedback.

In Richmond Hill, the ROS were initially delivered by two co-facilitators, one from the I&C unit and one from the Employment unit. However, because of changes in staffing responsibilities, the ROS were subsequently being delivered by only one person at a time (two staff from the Employment unit share the responsibility for delivery). While there were no major negative impacts reported as a result of this change, the HRCC was considering returning to a co-facilitation model because of the repetitive nature of the sessions and the potential for burn-out for staff who deliver the same message session after session.

It was reported that finding the right person to deliver a ROS could be

challenging since the facilitator must be comfortable in front of a group and be able to manage hostile clients. The current facilitators reported feeling comfortable with their ability to deliver sessions.

When originally launched, a greater focus was placed on Employment Insurance issues than was the case at the time of the study. Over time, that focus has shifted to place increased emphasis on employment issues. Changes in content have usually been associated with changes in available services or changes to the EI legislation. In addition, changes to the content of the sessions have been directed by the type of questions which claimants ask while attending.

The information presented as part of the session is included in a generic script which is read to participants. The fact that the information will be read to clients from a prepared script is clearly stated in the introduction to the sessions. The script is designed to meet the needs of a variety of clients, regardless of their background. There is also a desire to keep the information simple and ensure it is inoffensive, since presentations are targeted to a broad range of clients.

A further aspect of why a scripted approach to the delivery of information is used is the potential to refer to this process in appeals cases. The HRCC noted that on a number of occasions they have been able to win appeal cases because actual portions of the ROS script could be used as an exhibit to demonstrate that persons did receive appropriate information and should have known about particular circumstances. Some overheads are used to complement the information presented in the script. A video is also shown on the Electronic Labour Exchange, and fact sheets and pamphlets are distributed to participants throughout the sessions.

At the conclusion of the sessions, participants are asked to complete a Self-assessment Work Sheet and return this form to the facilitator before leaving. The Self-assessment Work Sheet is designed to help participants quickly identify where they might need assistance in returning to work. Once collected, the form remains with the HRCC but it is not followed-up on.

Getting the focus of the ROS right has been a challenge for the HRCC. There is a recognition that the ROS are not just a way to "bring people in and cut them off." With the shift of responsibility for the delivery of ROS to Employment, the focus on Employment Services has become a larger portion of the session.

3.3.4 Client Monitoring and Follow-Up

The York HRCC has developed specific procedures to handle various client attendance scenarios. Prior to attending their scheduled session,

clients can contact the Rescheduling Clerk to reschedule their appointment if they have a valid reason.[9] Circumstances when a notification is to be sent to the I&C Unit include the following:

- FTR;
- unable to reschedule an alternative interview within five days due to the client's unavailability;
- cancelled due to prolonged illness or incapacity;
- no transportation; and
- no day-care or sitter.

I&C verifies the Group Session Scheduling System (GSSS) system for any entry which must be followed-up for investigation. Persons who simply fail to attend the ROS without a satisfactory explanation, or those for whom deliverers suspect fraud at the session, are reported to I&C agents. These agents attempt to contact FTRs by phone in order to determine the person's reason for not attending the session. If they are given a satisfactory reason, the client is rescheduled. If a message is not returned by noon the following day, or if no satisfactory reason is provided, a recommendation for disqualification and/or disentitlement is sent to an I&C officer to be imposed as of the scheduled date of the session.

Any disentitlement is tracked by entering code 73 into the I&C Case Management (ICCM) system. This allows the HRCC to monitor any resulting direct or indirect savings from FTRs. The HRCC estimates that 95% of code 73s are the result of FTRs. The remaining 5% would be as a result of investigations for all reasons other than FTR.

Exhibit 15, shows scheduled and actual attendance figures for the period of April to October, 1997.

Exhibit 15

Scheduled and Actual York Region ROS Attendance Figures for April to December, 1997

Type/Location	# of Claimants Scheduled	# of Claimants who Attended	FTRs	Cancelled
Richmond Hill ROS	5,827	4,289 (74% of	1,092 (19% of	5% of those

		scheduled)	scheduled)	cancelled*
Newmarket ROS**	1,303	980 (75% of those scheduled)	258 (20% of those scheduled)	65 (5% of those scheduled)
School-Related (Richmond Hill & Newmarket)	2,250	1,877 (83% of those scheduled)	234 (10% of those scheduled)	139 (6% of those scheduled)
Total	**9,380**	**7,146 (77% of those scheduled and 42% of total Regular claimants)**	**1,584 (17% of those scheduled)**	**Average cancelled rate is 5%**

* Figures for claimants who cancel were only available for November and December 1997. For that reason, this number represents a percentage of only those claimants who were scheduled during a two month period and not from April to December. Of 1,705 scheduled claimants, 89, or 5% cancelled.

** Figures provided by the Newmarket HRCC are based on July to December figures only. Prior to July, 1997, the HRCC was offering a two hour Shaping the Future Session.

The Richmond Hill HRCC I&C staff reported that the number of FTRs to the sessions has dropped over the last few years. As a result, savings have also fallen. It was reported that people who FTR tend to be new users of EI rather than repeat users. Repeat users have been through the process before and may better understand the requirement to attend the session.

The number of investigations resulting from the York ROS and the rate of overpayment and disentitlements over the last three years are shown in Exhibit 16.

Table

Exhibit 16 ROS Investigations and Outcomes				
Year	**Investigations Resulting from the ROS**	**Disentitlements**	**Overpayments**	**DD Rate #DD / #INV**
1995-96	828	460	245	56%
1996-97	467	304	103	65%
1997-98 (April to December)	550	235	63	42%
Total	**1,845**	**999**	**411**	**Average: 54%**

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3.3.5 Administrative Costs

Like the other sites researched, York does not keep track of the costs associated with delivering ROS. The costs presented below were estimated by calculating the percentage of time spent by staff in specific activities. The estimated costs are presented in Exhibit 17.

From the above table it can be seen that it cost the Region approximately $108,063 to deliver the ROS. For future comparisons with savings, scheduled and disentitlement figures, all of which are provided for April to December only, operating costs can be estimated at $81,047 for this same nine month period.

3.3.6 Savings to the EI Account

York uses the national ICCM system to track savings to the EI account. The investigation code 73 is also used at this location to capture savings attributed to GIS. The HRCC was asked to provide information on direct and indirect savings generated by the ROS since its inception in 1995. Exhibit 18, details the information provided.

Exhibit 17

Costs Associated with the Delivery of Rights and Obligations Sessions in York Region

ROS – Richmond Hill HRCC				
Task	**Resource**	**Value**	**% of Time Devoted to Task**	**Cost**
Scheduling by CSR	CR4	27,091*	83%	$22,490
Screening of attendees/ Conducting sessions	CR4 (X 2)	$27,091	50%	$27,091
Re-scheduling and client follow up	CR2	$20,746	80%	$16,596

client follow-up				
FTR (2nd time FTR) follow-up	CR4	$27,091	10%	$2,709
FTR interviews	PM1	$36,201	25%	$9,050
ROS development and administration	PM1	$36,201	10%	$3,620
Distribution of handouts	Photocopies			$300
Sub-total				**$81,856**
ROS – Newmarket HRCC				
Scheduling by CSR	CR4	$30,144	5%	$1,507
Rescheduling and client follow-up	CR2	$22,836	10%	$2,283
Conducting sessions • April-June: DM • July-Dec: CR4		$32,659 $30,144	5% 10%	$1,632 $3,014
Resource development and administration	PM1	$30,144	2%	$608
Distribution of handouts	Photocopies			$100
Sub-total				**$9,144**
School Related ROS – Richmond Hill and Newmarket HRCCs				
Scheduling and clerical support	CR2s	$21,120	10%	$2,120
Claims taking and delivery of sessions (phase 1)	CR4s	$29,317	20%	$5,863
Development and delivery of sessions (phase 2)	PM1s	$36,201	14%	$5,068
I&C follow-up	PM2s	$40,123	10%	$4,012

interviews/ On-site co-ordination				
Sub-total				**$17,063**
Grand Total				**$108,063**
Yearly estimated cost per scheduled client **				**$9**

* This salary figure is the median for the CR4 salary band which ranges from $25,881 to $28,301.

** Since York is estimated to have scheduled 9,380 Regular (Type 2) claimants between April and December and it cost the Region approximately $81,047 to deliver the sessions during that period, the estimated costs of delivering ROS is estimated at $9 per client.

Exhibit 18

York Region EI Account Savings

Year	Direct Savings	Indirect Savings	Total Savings
1996/97	$85,655	$1,083,025	$1,168,680
1997/98 (April to December) **	$59,826	$714,410	$774,236

** Because the HRCC moved its office to its present location in Richmond Hill, the delivery of ROS was suspended during the Spring of 1997. This move impacted total savings which have been generated in 1997/98.

Since operating costs for the ROS in York Region were estimated to be about $81,047 for the same nine month period, and gross savings generated by the ROS from April to December were $744,236, the net savings are estimated at $663,189. Given that approximately 9,380[10] clients were scheduled for the ROS for that same period, gross savings per scheduled client in the York Region is $79.00 and net savings, $71.00.

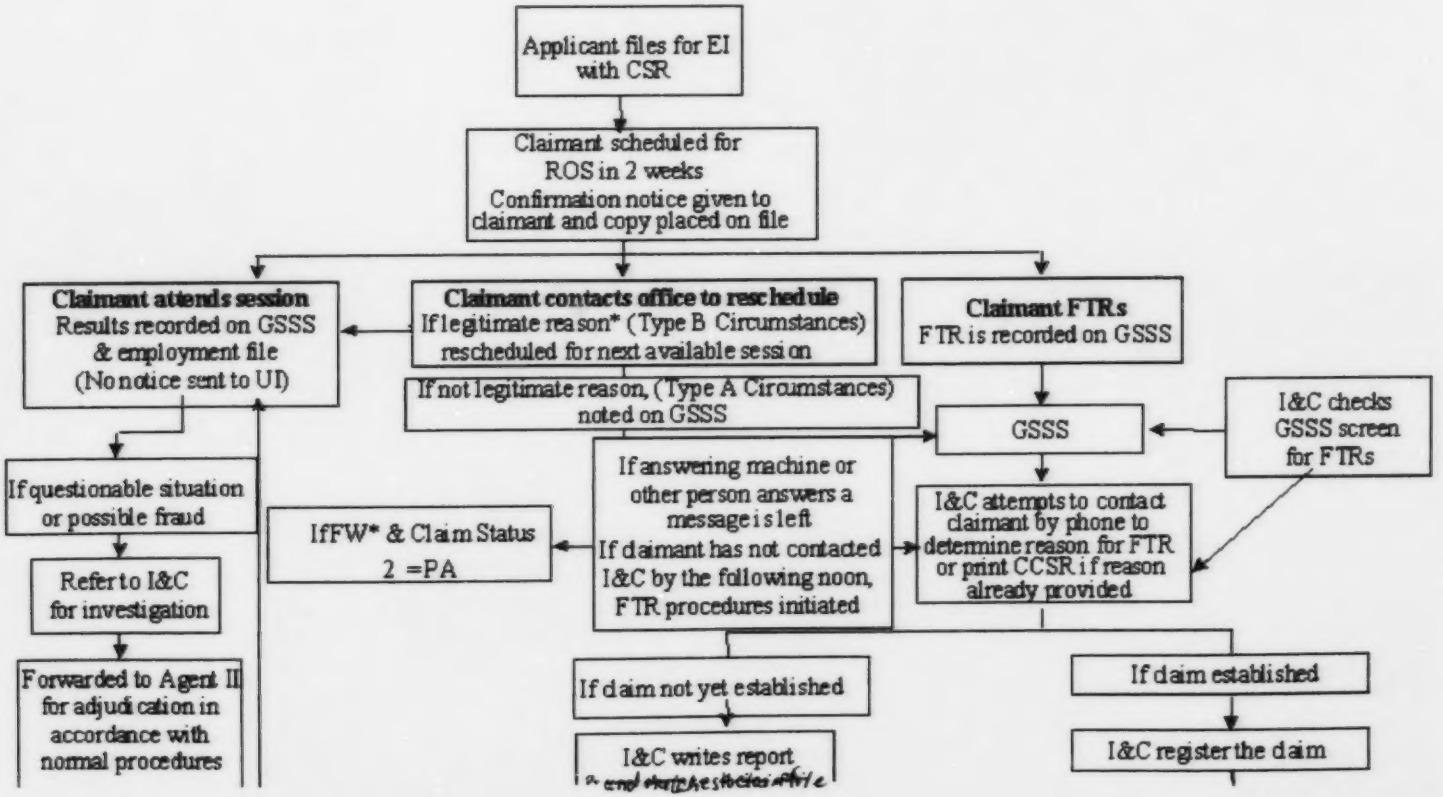
York staff reported that not only has the delivery of the ROS contributed to creating direct and indirect savings, but the sessions are also believed to contribute to reducing staff workloads, thereby generating operational savings. These savings are the result of having more informed clients who have fewer questions and who more accurately complete forms and cards. A summary of the information on the ROS in York Region is provided in Exhibit 19.

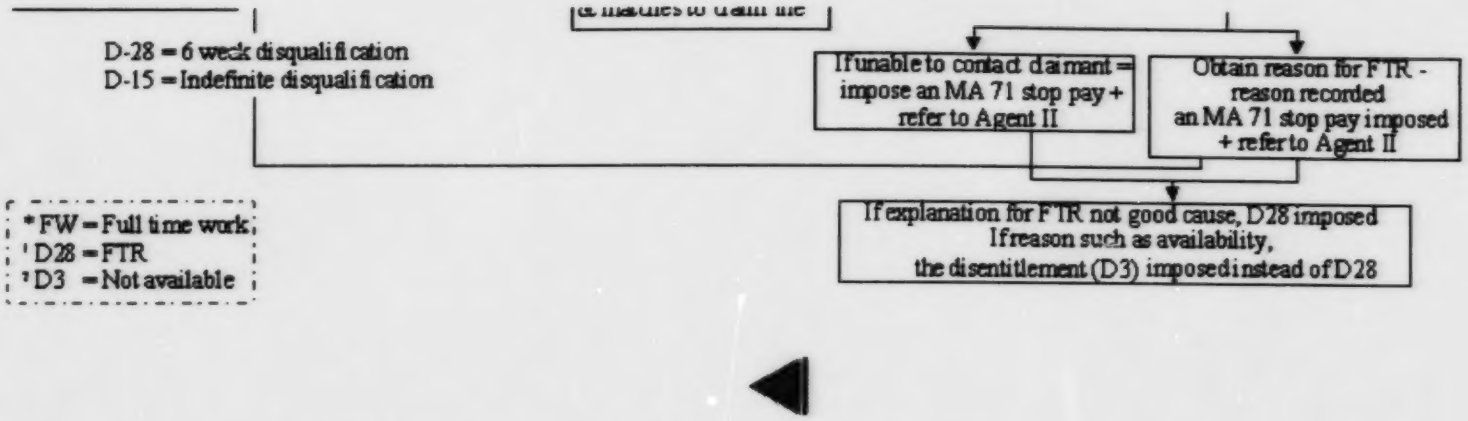
Exhibit 19

Summary Information, York

Attribute	1997-98
Total Number of Scheduled Clients (April to Dec. 1997)	9,380
Total Number of Disentitlements (April to Dec. 1997)	235
Cost	
Annual Operating Costs for the ROS*	$81,047
Operating Cost per Scheduled Client	$9
Savings – Gross	
Direct Savings (April to Dec. 1997)	$59,826
Indirect Savings (April to Dec. 1997)	$714,410
Total Gross Savings (April to Dec. 1997)	$744,236
Gross Savings per Scheduled Client	$79
Gross Savings per Disentitlement	$3,166
Savings - Net	
Total Net Savings (April to Dec. 1997)	$663,189
Net Savings per Scheduled Client	$71
Net Savings per Disentitlement	$2,822

Exhibit 20
Procedures for GIS (ROS) in Richmond Hill


Applicant files for EI with CSR
Claimant scheduled for ROS in 2 weeks
Confirmation notice given to claimant and copy placed on file
Claimant attends session
Results recorded on GSSS & employment file
(No notice sent to UI)
Claimant contacts office to reschedule
If legitimate reason* (Type B Circumstances) rescheduled for next available session
Claimant FTRs
FTR is recorded on GSSS
If not legitimate reason, (Type A Circumstances) noted on GSSS
GSSS
I&C checks GSSS screen for FTRs
If questionable situation or possible fraud
Refer to I&C for investigation
Forwarded to Agent II for adjudication in accordance with normal procedures
If FW* & Claim Status 2 =PA
If answering machine or other person answers a message is left
If claimant has not contacted I&C by the following noon, FTR procedures initiated
I&C attempts to contact claimant by phone to determine reason for FTR or print CCSR if reason already provided
If claim not yet established
I&C writes report
If claim established
I&C register the claim


D-28 = 6 week disqualification
D-15 = Indefinite disqualification
If unable to contact claimant = impose an MA 71 stop pay + refer to Agent II
Obtain reason for FTR - reason recorded an MA 71 stop pay imposed + refer to Agent II
If explanation for FTR not good cause, D28 imposed
If reason such as availability, the disentitlement (D3) imposed instead of D28
* FW = Full time work
' D28 = FTR
' D3 = Not available

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A flow chart describing the York process is presented in Exhibit 20.

View Exhibit 20
Procedures for GIS (ROS) in Richmond Hill

3.3.7 Impacts on Clients

This section includes a review of the impacts on client behaviour which may be attributable to their participation in the ROS, as well as their views on the session and its perceived usefulness in helping them to become re-employed.

From the clients' perspective, the session has been designed to inform them of their rights, to let them know about the services available through the HRCC and to help them find work. Results from the exit questionnaire and focus groups indicate that participants appear to have a clear sense of the session's emphasis on educating clients. They agreed that as a result of attending the session, they are now somewhat more knowledgeable. Over half of those surveyed through the exit questionnaire indicated that their understanding of rights and obligations had increased and that the session had provided them with information on the services which would help them find work. Some focus group participants cited examples of obligations that they had learned about during the session, although they felt that this information was "common sense" and very straightforward.

However, focus group participants clearly felt that a greater emphasis was placed on rights and obligations than on employment services. One participant stated, "That's why they call it a Rights and Obligations Session." Nevertheless, three-quarters of survey respondents indicated that they now had better information about the services available to help them find a job.

Clear evidence of changes in behaviour as a result of the ROS was not readily apparent, perhaps because the majority of focus group participants had attended the ROS session within a month of attending the focus group and may not yet have established personal plans for looking for work. Further, having attended the ROS early on after making a claim, they may not have felt as anxious about their ability to find work as they might have felt later. In addition, differences among the knowledge level or perceived behaviour of ROS participants and non-participants were not evident. Results of the pre-focus group

questionnaires administered to these two groups do not indicate any substantial differences in attitude or behaviour.[11] For the most part, participants were confident that they would be able to find work, but were concerned about the pay they would be able to secure. They were also concerned that they might have to accept work which offered a low paying wage or which did not interest them.

Although the majority of survey respondents agreed or strongly agreed that the session was useful and informative, the perceived usefulness of the session varied among focus group participants. In rating the session, some focus group participants stated that their rating would depend upon what the objectives of the session were. If the objectives were simply to provide claimants with information on rules and regulations, and inform them of where to look and go for assistance, then it would receive a high rating. Those who were interested in particular programs or specific information found it less useful and rated it lower. Some felt that the session was simply duplicating information which was given to them in the Claimant's Rights and Obligations form which had been handed to them when they came in to file their claim.

While some reported that they had left the session feeling discouraged, as if they were now on their own in becoming re-employed, others found the session to be reasonably useful in that it had provided them with a sense of hope about returning to work. "You do feel uncomfortable in the session because being unemployed is an uncomfortable feeling, but it was helpful because there was information given on telephone numbers, and so on."

Participants felt better because they were able to learn about a variety of tools to help them in their job search. This may have motivated them to look for work, or simply given them some additional ideas on what to do to get back into the labour force.

3.3.8 Satisfaction with the GIS

The HRCC is reportedly very satisfied with what has been achieved as a result of the ROS. According to staff, the number of poorly completed cards has dropped since the introduction of the sessions. From the HRCC's perspective, much of the benefit which is derived from the sessions comes from preparing more knowledgeable clients. In general, facilitators did not indicate any dissatisfaction with their role in the delivery of ROS. However, facilitators did indicate that there were some elements of the ROS which they would like to see changed (e.g., timing of the presentation of the Job Loss Cycle material during the session).

From the client's perspective, there is no formal way to offer feedback on the ROS. For the purposes of this study, feedback on client

satisfaction with the ROS was collected through the exit questionnaire administered to ROS participants and focus groups participants.

The ratings that ROS participants gave to the session show that in general, they tended to be satisfied or very satisfied with all aspects of the session. Very interestingly, some of the highest levels of satisfaction were for "tone of session delivery" and the "attitude of the session facilitator/deliverer." This is interesting because focus group participants' comments showed a relative dissatisfaction with the delivery of the session. Although no negative comments were made about the facilitator's tone or attitude, participants found the presentation to be somewhat "mechanical" because the session was tightly scripted. To focus group participants, the facilitator "was reading a book. There was no understanding. [The facilitator] was there to give you the information." It was suggested that "[The HRCC] could put a tape recorder on and get rid of the person," or "They could put a video on and then give you a questionnaire." Despite these comments about the presentation of the session, facilitators were described as pleasant. However, the fact that they were reading from a script gave participants the feeling that the facilitator would not be able to help them or answer their questions.

In general, satisfaction with the ROS varied greatly among focus group participants. Many focus group participants felt that the session had not been as useful as they had anticipated. There were mixed views on the value of the information presented, with some saying that they already knew much of the information which was provided, that it was common sense or that what they were told was too general to be of any use.

Some found that the general approach taken in the session (i.e., general information to address all client needs) did not accommodate their individual needs. They recognised that it might be necessary to go over how to complete cards and forms for some claimants, but that the session was somewhat boring for those who already knew the information. They would have preferred to receive more individualised information, or information on specific programs and services, rather than simply hear the moderator "run through" the material.

Participants were generally satisfied with the length of the session, its location and the time that it was held. Some focus group participants did indicate that they would like to attend the session even earlier in their claim in order to have as much information as possible as early as possible to help them look for, and find, work. They suggested that the session be offered to them within the first week of filing.

In terms of obtaining answers to questions, very different experiences were cited by focus group participants. Some had participated in sessions where the facilitator had been very helpful and was willing to

stop and answer questions. Conversely, some people attended sessions where the facilitator would only answer questions at the end of the presentation. Others indicated that it did not matter whether or not they could ask questions, because they found the session intimidating from the beginning, especially if it was their first time on EI: "You don't want to ask questions because you don't want to stand out."

Focus group participants were asked to provide suggestions for improvement to the session. Their comments include the following:

- make participation in the session less threatening by changing the tone of the Confirmation of Attendance form;
- place more emphasis on looking for work rather than on rights and obligations. This could include providing more information on job finding skills;
- divide the session into various parts so that participants can receive generic information, and then let them choose a session they would like to attend which would better respond to their individual needs. A variation of this might include an all day session covering a variety of topics. The objective would be to ensure that the needs of various types of individuals are met (e.g., young versus older workers);
- create ties to the employer (e.g., bring in employer speakers, have employers on hand);
- use a video to present information on rights and obligations;
- clarify the objectives of the session in the Confirmation of Attendance form;
- provide more opportunities for individualised assistance;
- provide handouts to participants when they file, rather than at the session, so that people have an opportunity to read them and prepare questions for the session;
- offer an initial session on rights and obligations and a later session on employment information; and
- establish a networking system to provide participants with the opportunity to hear about job opportunities.

3.3.9 Objective Achievement

We have also attempted to assess whether the following objectives and potential impacts for the ROS have been achieved:

- to inform clients of their rights and obligations, resulting in better informed clients; and

- to inform clients of the employment services available to them, with the result of improving marketing of services and programs and a quicker return to work by claimants.

It would appear that the sessions are helping the HRCC achieve its objective of informing clients of employment services available to them through the improved marketing of services and programs.

However, overall, it does not appear that the desired impact of having claimants return to work more quickly by attending an ROS has occurred, although there is slight evidence that some information provided is causing claimants to think more carefully about their need to become re-employed and to look for work.

4. Comparison of GIS Models

This section presents similarities and differences in the delivery structure and outcomes between the three models investigated. The strengths and weaknesses of each model are discussed. Lastly, the usefulness of each model for achieving specific outcomes is outlined.

4.1 Comparison

This section presents the similarities and differences between the three models examined.

4.1.1 Delivery Structure

Exhibit 21, illustrates the similarities and differences in the delivery structure of each site. The Lethbridge and York GIS models closely resemble each other whereas the Mississauga model is quite different. The Lethbridge and York GIS are about an hour long with an internal staff presenting information to the claimants. There is very little interaction in these groups. The Mississauga GIS is an interactive day long session presented by facilitators from a third-party deliverer.

Exhibit 21
Overview of Delivery by Site

Delivery Attributes	Lethbridge	York	Mississauga
Format	Overheads (evolved from informal chat to flip chart to overheads with video)	Deliverers read from script presented on overheads	Mix of facilitation with the whole group and of group exercises. Use of flip charts
Duration	Approx. 45 min.	45 - 60 min.	1 day (9:00 - 3:00)
Setting	Boardroom that can accommodate 20 participants	Room that can accommodate up to 40 participants	In a large room located at the Work Web (a resource centre for unemployed individuals) which can accommodate 20 to 25 participants
Number of sessions per month	Average of 8 (2 per week)	Approx. 60 (15 per week)	Approx. 25
Number of participants per session	Approx. 20	Approx. 30	Between 10 and 20
Number of deliverers per session	1 who presents, 1 who checks files	1 Employment staff (originally co-presented by I&C and Employment)	2 co-facilitators
Deliverers trained?	Some trained formally, others practiced with co-workers and learned on the job	No formal training. Rehearsal sessions in front of colleagues and learned on the job	Some possess presentation skills as part of their professional background. Others are trained on the job
Delivery style	Straightforward, little interaction with participants	Deliverers read script to participants	Animated and energetic, with much interaction with participants

4.1.2 Cost and Savings Figures

The cost of delivering the GIS in Lethbridge, York and Mississauga

(Exhibit 22) was estimated at $60,900, $81,047 and $275,459, respectively for the April 1 to December 31, 1997 period. The lower cost for the Lethbridge GIS is likely due to the fact that they only conduct an average of 8 sessions per month, compared to 60 in York and 25 day-long sessions in Mississauga (the equivalent of 125 one hour sessions).

Exhibit 22
Summary of Cost and Savings Information
(April 1 to December 31, 1997)

Attributes	Lethbridge Figures	York Figures	Mississauga Figures
Number of Scheduled Clients	1,218	9380	5,919
Number of D&Ds	355	235	582
Cost			
Total Operational Cost Operational	$60,900	$81,047	$275,459
Cost per Scheduled Client	$50	$9	$47
Gross Savings			
Direct Savings	$46,924	$59,826	
Indirect Savings	$1,225,785	$714,410	
Total Gross Savings	$1,272,709	$744,236	$1,572,298*
Gross Savings per Scheduled Client	$1,045	$79	$266
Gross Savings per D&D	$3,585	$3,166	$2,702
Net Savings			
Total Net Savings	$1,211,809	$663,189	$1,296,839
Net Savings per Scheduled Client	$995	$71	$219
Net Savings per D&D	$3,414	$2,822	$2,228

Mississauga has slightly higher total and net savings figures than Lethbridge, who is higher than York. Although the total gross and net savings are comparable across all three sites, Lethbridge has a higher savings per scheduled client value than both Mississauga and York. One obvious reason is that the number of clients scheduled is much lower than in Mississauga and York. Other reasons may also be related to the level of intensity associated with the GIS:

- I&C investigators review client files during a GIS session, which allow them to question any inconsistencies or omissions that might lead to a D&D. Claimant file reviews are not a part of the GIS at the other two sites;

- Participants are asked to complete and bring a job search record and an availability questionnaire to the session. Those individuals with incomplete or insufficient job search efforts or questionable availability to work are directed to a one-on-one interview that might lead to a D&D. Although questionnaires are completed in York and Mississauga, neither of them ask for a job search record or ask participants about their availability;

- I&C investigators are responsible for both conducting the sessions and the investigations, whereas York deliverers are Employment staff and Mississauga contracts the delivery of the GIS to a third party; and

- The Lethbridge office has developed a system to capture GIS savings to ensure that the savings are captured and reported accurately, whereas the other two offices are calculating savings manually or from various systems.

4.1.3 Impact on Clients

Participants in the GIS who were observed while conducting the site visits were administered an exit questionnaire. The questionnaire included questions on perceived usefulness of, and satisfaction with, the session participants had just attended. Presented in Exhibit 23, are the results to the question that asked, "On a scale of 1 to 5, where 1 = "strongly disagree" and 5 = "strongly agree", please tell us how you feel about each of the following statements."

Exhibit 23
Impacts of the GIS on Participants

Impacts Rated	Lethbridge	York	Mississauga
% of respondent who either agree or strongly agree that...			
The session changed my views on finding employment	3 (20%)	3 (22%)	7 (47%)
The session changed my views on maintaining employment	1 (9%)	4 (33%)	4 (36%)
The session gave me a better understanding of my EI rights and obligations	10 (66%)	6 (55%)	4 (36%)
I now have a better idea of where			

I can go to obtain information about my EI rights and responsibilities	5 (38%)	6 (55%)	7 (64%)
The session informed me about the services that are available to help me find a job	5 (36%)	5 (46%)	9 (75%)
I now have a better idea of where I can go to obtain information about the services available to help me find a job	6 (46%)	8 (73%)	9 (82%)
The session was useful and informative	7 (54%)	7 (64%)	8 (73%)

Impacts of the GIS on participants are more pronounced in Mississauga. It had the highest percentage of respondents who agreed with all the statements, except one. Compared to York and Lethbridge clients, those in Mississauga generally reported lower awareness of their EI rights and obligations. This is not a surprising result given that, unlike the sessions researched in Lethbridge and York, EI rights and obligations is not a topic that is covered in detail by the Booster Sessions. However, focus group participants who had attended a Jump Start Session (held prior to the Booster session) usually reported being well aware of their EI rights and obligations.

Impacts on people's behaviour and attitudes as a result of attending a GIS were more difficult to gauge but apparent in some cases. Because of the interactive nature of the session in Mississauga, and its large focus on job loss and job finding, greater types of impacts were noted there. Focus group participants mentioned changing their résumé as a result of the information they received from the session. Others reported that as a result of attending the Booster Session, they were now considering contract work, while some had changed their view about the labour market. There was also an impact on people's knowledge of where to go to obtain more information about the services available to help them find a job, especially in Mississauga. In this location, a number of participants mentioned that they had been using new avenues and services to look for employment since attending the Booster Session.

In all three sites, there were indications that the GIS had had an impact on people's morale. More than in any other place, the Booster Sessions in Mississauga had a positive impact on people's level of morale, self-esteem and self-confidence. The majority of focus group participants confirmed that the Booster Session had given them a lift that made them feel better about themselves and renewed their motivation in their job search. Similar comments were heard in York, where participants indicated that attending the ROS had made them feel better about their situation because they realised that they were

not the only ones unemployed. However, comments were also heard to the effect that the session made people feel more alone since they felt that the HRCC would not be able to help them any further.

In rating the sessions, some focus group participants stated that their rating depended upon the objectives of the session. Participants in York stated that if the objective was simply to provide claimants with information on rules and regulations, and inform them of where to look and go for assistance, then it would receive a high rating. Those who were interested in particular programs or specific information found it less useful and rated it lower. In Lethbridge, the perceived usefulness of the session depended on how much participants already knew about EI. For example, first-time claimants reported learning a lot and appreciated the fact that time had been taken to explain EI to them.

Comparisons on impacts between focus group participants who had attended a GIS and those who had not were difficult to make (because of the small number of individuals who attended the non-participant focus groups in Mississauga and York). However, in Mississauga, non-GIS participants generally seemed less aware of the various avenues and possibilities open to them in their search for employment than were participants who had attended a Booster Session. In Lethbridge, survey results indicated that GIS participants appeared to know more than non-participants about the services available to help them find a job.

4.1.4 Satisfaction

HRCC management and staff in all three sites studied noted that they were very satisfied with the results which have been achieved as a consequence of introducing the GIS at their respective HRCCs. Reasons for satisfaction included an improvement in overall claimant knowledge, including better understanding of their rights and obligations, more accurately completed Claimant Reporting Cards and other forms, improved detection of abuse and misuse of EI (e.g., increased disentitlements, voluntary disclosures), improved client motivation to seek re-employment, and the potential to achieve savings. Other cited benefits of the GIS included their ability to offer an opportunity for exchange of information, answer claimants' questions and guide them back on track towards re-employment. As an example of a strong statement of satisfaction, in Mississauga the sessions were reported by the manager as being "the most positive interaction the HRCCs have ever had with their clients." Lethbridge staff see the GIS as "good quality service to clients" which they "can't do without." HRCC managers in both York and Mississauga placed an emphasis on the GIS' use as first and foremost an information and employment intervention - not a control or detection mechanism. In Mississauga, this message has been strongly communicated, internally

and externally, in order to overcome the perception that "I&C is out to get people."

The exit questionnaire that was administered to GIS participants to collect feedback on the session asked the question " On a scale of 1 to 5, where 1 = "very dissatisfied" and 5 = "very satisfied", please rate the following components of the GIS." The results of this question are presented in Exhibit 24.

In general, focus group participants in York and Lethbridge tended to be less satisfied with their participation in the GIS than were those in Mississauga. In Lethbridge, almost all focus group participants stated that the session seemed to have threatening undertones. A number of participants saw the sessions as a "hoop to jump through" in order to maintain receipt of their claims. It is interesting to note that while focus group participants in Mississauga generally expressed higher levels of satisfaction with the GIS, the only area with which survey respondents were noticeably more satisfied was their level of participation.

Exhibit 24
Satisfaction with Aspects of the GIS Sessions

Aspects of the Session Rated...	Lethbridge	York	Mississauga
% of respondents who said that they were either satisfied or very satisfied with...			
...the usefulness of the information provided	9 (64%)	8 (57%)	7 (50%)
...the amount of information provided	10 (72%)	10 (77%)	8 (62%)
...the type of information provided	9 (69%)	10 (72%)	8 (62%)
...the attitude of the session facilitator/instructor	13 (100%)	11 (84%)	12 (92%)
...the tone in which the session was delivered	13 (100%)	9 (96%)	11 (85%)
...their level of participation in the session	6 (55%)	9 (64%)	10 (77%)
...the length of the session	12 (92%)	9 (69%)	10 (77%)
...the location of the session	13 (100%)	9 (65%)	11 (86%)
...the time of the session	13 (100%)	12 (86%)	9 (69%)
...the language in which the session was offered	12 (92%)	12 (86%)	12 (92%)

session was offered		(86%)	
...the format/structure of the session	10 (77%)	10 (71%)	11 (85%)

Note: The total number of respondents is not the same for all of the components rated because not all respondents answered all questions.

Specific areas of satisfaction for participants in Mississauga included the motivation that participants got out of the session as well as specific tools and approaches they could use in their job search. Many participants also expressed high levels of satisfaction with the Booster facilitators, whom they described as knowledgeable, outgoing and energetic, and supportive. This view was different from that expressed in York and Lethbridge. Although no negative comments were made about the facilitators' tone or attitude in York (the facilitators were described as pleasant), participants found the ROS' delivery to be somewhat "mechanical" and "programmed" because it was tightly scripted. In Lethbridge, facilitators were viewed as "threatening", "intimidating", and "condescending." Beyond how the facilitators were viewed in Lethbridge, participants' level of satisfaction with the I&C GIS session was also impacted by the fact that one I&C staff was at the back of the room collecting forms and reviewing files. This was sometimes viewed as more intimidating than the moderator. Participants found the calling of the names of persons who were asked to either remain behind or allowed to go to be intimidating as well.

Mississauga participants expressed satisfaction with the ability of facilitators to answer their questions. However, in York and Lethbridge, participants were not as satisfied. In York, questions could only be asked at the end of the session. In Lethbridge, some clients said they did not ask questions because the deliverer appeared rushed and just wanted to get the session over with as fast as possible. In Lethbridge, focus group participants who had used that route were satisfied with the facilitators' ability to answer their questions and indicated that they were friendlier when spoken with one-on-one than when speaking in front of the group.

4.1.5 Achievement of *Shaping the Future* Objectives

The objectives of the *Shaping the Future* initiative are the following:

- introduce active interventions to help implement behavioural changes in employees and workers;
- assist individuals to return to work more quickly;
- reduce EI dependency; and
- protect the integrity of the EI account.

Assessing the extent to which the three models are achieving these objectives is difficult to do given the nature of the objectives and of the research questions developed for this study. However, the findings of the monitoring study indicate that of the three models, the Booster Sessions are most effective at having an impact on the behaviour of clients in the area of employment search. However, given the focus of the York and Lethbridge models on EI Rights and Obligations, these two models are more likely to have an impact on behaviours such as the accurate completion of cards or preventing fraudulent use of the system.

The impact of the GIS on assisting individuals to return to work more quickly cannot be assessed with certainty using the findings from this study. However, to the extent that clients in all three sites are provided with information on available programs and services that can help them in their job search, it would be expected that the GIS would have some impact in this area. The Mississauga model, in particular, would be expected to contribute to the achievement of this objective given the site's objectives of motivating clients to maintain their job search and make it as effective as possible. A few instances were indeed given of clients who had taken steps to accelerate their job search or found work as a result of the Booster Sessions.

Assessing the extent to which dependency on EI is reduced is a very complex endeavour that can only be determined with longitudinal data, and is therefore out of the scope of this study.

The findings related to the number of D&Ds imposed as a result of GIS-related activities clearly indicate that all three models play an important role in protecting the integrity of the EI account.

4.2 Strengths and Weaknesses of the Models

The strengths and weaknesses of the three models in terms of delivery structure are summarised below.

- The most evident strength of all three models is the interaction integrated in the Mississauga model. Clients are very satisfied with their level of participation and the amount of hands-on activities in the Booster Session. Lethbridge's and York's straightforward presentation of information can therefore be considered a weakness. Even though Lethbridge does not read a script to the claimants, there are no group activities and participants are hesitant to ask questions during the presentation.

- Another strength of the Booster Session is that the deliverer has flexibility to better meet client needs. Booster Session deliverers

do not follow a script or slide presentation but rather a general outline of the day's agenda, so they are able to answer questions on the spot and address any concerns right away. Lethbridge, and especially York, are concerned about the consistency of the information presented, so the deliverers try to stay as close as possible to the written script.

- On the other hand, the Lethbridge, and especially York model would hold better in the case of an appeal because all clients receive exactly the same information.

- A weakness at the York session is that deliverers present many sessions a month (60 session for two deliverers). This may contribute to fatigue and disinterest among deliverers. Lethbridge only presents eight sessions a month. The rest of the deliverers' time is spent on investigative activities.

- On the other hand, the large number of sessions conducted in York and Mississauga can also be viewed as a strength, because it allows them to see more claimants. York presented GIS to 9,380 claimants, Mississauga conducted the Booster Session with 5,919 whereas Lethbridge only saw 1,218 claimants through the GIS between April and December 1997.

- The scheduling process of the York model is a strength. It schedules and gives claimants information on the GIS when they apply for a claim. This process eliminates the need to manipulate databases to select clients and mail packages out to them.

- Both Mississauga and Lethbridge conduct follow-up with GIS clients after they attend a session. By following up with claimants, staff are better able to help them identify the avenues that can lead to employment. York's weakness is that there is no follow-up work (outside of investigation activities) conducted with GIS participants.

- A weakness witnessed across all three sites is the intimidating tone and lack of information on the letter directing clients to attend.

- Objectives of the GIS are very broadly defined for the three models. Broad objectives make it difficult to assess specific outcomes against these objectives.

- Currently there are no formal mechanisms for client feedback or evaluation of the GIS in York and Lethbridge. This is a weakness because GIS can be improved with client suggestions. While the third-party deliverer asks for client feedback, this feedback is not anonymous, limiting the opportunities to hear

honest comments.

- The York GIS model was designed by both I&C staff and Employment staff. This is a strength because it ensures better coverage of EI initiatives and avoids duplication of efforts. It also strengthens relationships between the two staff groups. Lethbridge, in retrospect, would have liked to have involved Employment staff with the GIS.

- The fact that Mississauga has a third-party delivering the session is also a strength. Mississauga is able to use their resources in other areas and it strengthens relationship between community partners.

The strengths and weaknesses of the three models in terms of cost and savings are as follows.

- A strength of all the models is that they have all achieved savings.

- Lethbridge has achieved higher savings per client and per disentitlement than the other two sites, most likely because of the intensity directed toward investigation activities.

- A weakness of all three sites is that there is insufficient capturing of accurate GIS-related data (number of scheduled clients, direct and indirect savings, etc.), which makes it difficult to evaluate or revise the GIS strategy. The Lethbridge HRCC is the most advanced in this area.

The strengths and weaknesses of the three models in terms of impacts and satisfaction are:

- A strength of all the models is that there is a definite educational impact on GIS participants.

- The GIS has helped deter fraud of the EI system. All three sites have identified hundreds of disentitlement and disqualification cases as a result of the GIS.

- Mississauga has the most pronounced impact on clients.

- Satisfaction of the GIS is high in all three sites.

4.3 Conclusion

The table below provides a starting point to identify which GIS model an HRCC might consider implementing given a set of specific circumstances or desired outcomes.

Exhibit 24
Satisfaction with Aspects of the GIS Sessions

Situation	Lethbridge	York	Mississauga
Tight labour market, with few opportunities for employment			✔
HRCC has limited resources to deliver the GIS	✔	✔	✔
HRCC has no staff available to deliver GIS			✔
HRCC has to serve a clientele located in remote or rural areas	✔		
HRCC has a multitude of partnerships with community deliverers which it wishes to promote		✔	✔
Under-utilization of Employment Benefits and Support Measures by claimants	✔	✔	✔
Suspected high level of fraudulent activity	✔		✔
HRCC has limited access to meeting or delivery space			✔
Desire for improved identification of claimants who would benefit most from Employment Benefits and Support Measures			✔
HRCC desires increased linkages between the activities of I&C and Employment	✔	✔	
Desire for improved ability to detect fraudulent activity	✔		✔
Desire for improved ability to successfully win claimant appeal cases	✔	✔	
HRCC desires high savings results	✔		

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5. Conclusions

This section presents a number of conclusions resulting from the integration of the findings from the three case studies researched in the context of this monitoring study. One of the overriding conclusions of this study is that not one of the three models examined during the course of the monitoring study is clearly better than the other. The selection of one model over the others would be driven by the objectives to be achieved by a given HRCC and the resources available.

Conclusion: All three models examined have achieved net savings since implementation.

None of the three sites researched as part of this study keep track of the costs involved in delivering GIS. Furthermore, each site calculates savings differently and there cannot be any guarantees made as to the accuracy of the savings estimates. Despite inconsistencies and inaccuracies in the way savings are calculated, it can be stated with certainty that all three GIS models examined have achieved savings. Furthermore, significant savings have been achieved. Even if costs, which were estimated by each of the sites, were underestimated, net savings would still result from the delivery of the GIS.

The examination of the three models researched for this study shows that there is not one best GIS model which should be recommended for implementation by other HRCCs. The various models examined have different objectives and, given that they all achieve savings, the selection of one model over another would have to depend on what a particular site wanted to achieve. Nevertheless, the Lethbridge site has achieved savings which are much higher than those achieved in Mississauga and York, and the level of investigating activities surrounding the GIS is much more intense in Lethbridge. It would therefore appear reasonable to conclude that the more intense the investigating activities, the greater the gross and net savings achieved.

One cannot stress enough that a site considering the implementation and delivery of any of the three GIS models examined should develop a mechanism to track the resources invested in the sessions to ensure that net savings are captured accurately.

Conclusion: The GIS are a tool that can be used to inform clients on a number of issues.

The GIS can be used to do more than achieve savings through the detection of fraudulent use of EI. As a matter of fact, the primary purpose of the model examined in Mississauga was not to achieve savings but to inform clients. The other two models also incorporate an information component that appears to be beneficial to clients. The

information provided can be on any of the following issues, a combination of a number of them or other issues relevant to a given community:

- EI rights and obligations;
- available programs and services;
- changes to Employment Insurance;
- changing labour market and labour market trends; and
- changing role of the government in supporting clients.

With the relatively recent changes made to the Employment Insurance Act, the changing role of the government in supporting clients (less support can be expected in the long term), and the rapidly changing labour market trends, HRCCs have a responsibility to make information available to their clients that will help encourage behaviour to make them less dependent on EI in the long-term. Even in tight labour markets, clients can only benefit from finding out about their options, and expanding their way of thinking about the labour market and the steps they can take to become re-employed. It can also be argued that the earlier clients are informed about the changing support they can expect from the government in the long term, the better off they will be in the long term.

The group nature of the GIS makes these sessions an efficient tool to inform many clients using as few resources as possible. This is an important consideration given that many HRCCs are currently struggling to do more work with fewer resources. Furthermore, the group nature of the GIS allows HRCCs who deliver them (either themselves or through a third-party) to inform clients in a consistent manner, which limits the possibility of misunderstandings on the part of clients.

Conclusion: GIS can be used as a tool to promote good client service and develop satisfying relationships with community partners.

The informative and educational nature of the GIS means that a number of clients leave the sessions better informed (e.g., about their EI rights and obligations, available programs and services). If they do not feel better informed about particular aspects examined during the session, they often feel better informed about where to go to find the relevant information. A better informed client is likely to be more satisfied with the services provided by his/her HRCC than one who feels uninformed or misinformed about what they should know while on EI (e.g., rights and obligations, how to go about finding a job). The

GIS are therefore a tool to promote good client service. The GIS can be used in part for this purpose by HRCCs that serve rural communities. By adopting the Lethbridge model, for example, where GIS are delivered to inhabitants of rural communities *in their communities*, an HRCC can be perceived as catering to and being dedicated to all of its clients, not just those with relatively easy access to the HRCC. This is an important consideration given the emphasis on client service under EI.

Furthermore, the GIS are an opportunity to actively provide information on the programs and services available in the community, not just those offered by the HRCC. This means that the programs and services delivered by third-party service providers can be promoted in a manner that is more active than the provision of pamphlets randomly picked up by clients. By incorporating information on the programs and services delivered by its partners into the GIS, HRCCs can further demonstrate their dedication to the partnerships developed within the community without assigning additional resources to this task.

Conclusion: GIS can be used by an HRCC as a way to bring together all of its units.

Ideally, a Group Information Session would be developed by involving all units of an HRCC (i.e., I&C, Insurance, and Employment). This would allow the integration of all information needed by clients to make their time spent on EI as productive as possible. It would also allow the GIS to incorporate information that is complete and consistent, limiting the need for clients to obtain information from various sources, which in turn would limit the potential for the provision of inconsistent information from client to client. Furthermore, the involvement of all units in the development of a GIS might provide an opportunity for an HRCC to identify areas where efforts are currently being duplicated and where any duplications could be reduced or minimised.

Conclusion: The efforts and cost involved in the development of a GIS can be minimised by using the experience of HRCCs that have already implemented GIS.

The HRCCs involved in the delivery of the three GIS models examined for this monitoring study have all developed materials for the delivery of GIS, as well as experience delivering them in their particular communities. An HRCC that would want to implement and deliver a GIS could therefore minimise the efforts involved by building on the existing GIS-related materials and experience. The three GIS examined are quite different and therefore offer a range of models, from very basic (e.g., York script) to more elaborate (e.g., Booster Session training manual), that an HRCC could use to deliver GIS in its location. As mentioned previously, the model selected would depend

on the objectives that an HRCC wanted to achieve through a GIS, as well as the resources available to it. These models could then be modified based on the characteristics of the communities where the GIS would be implemented, and further modified based on experience. Indeed, the key informants for the three sites researched mentioned that the GIS in place in their community were all modified based on factors such as experience and environmental changes.

Conclusion: GIS provide an opportunity for clients to realise that they are not alone in their situation.

If anything, participating in a GIS allows clients to be in an environment where they realise that they are not alone in their situation. This realisation can lead them to an emotional uplifting from their experience, which might in turn lead to a renewed effort in their job search.

6. Lessons Learned and Best Practices

This section of the report presents the lessons learned from the three sites researched and practices which other HRCCs interested in implementing GIS should consider applying.

6.1 Lessons Learned

This section highlights the main lessons learned, by heading, by the three sites examined as they designed, implemented and delivered their respective GIS. One important lesson learned, which came in part from attempting to include cost and savings information in this report, relates to the HRDC systems in which information related to the GIS is entered. Because of the difficulty encountered in obtaining accurate and consistent information, consideration should be given to reviewing the systems currently used to assess their capacity to collect accurate and consistent data, and identify any information collection gaps.

6.1.1 Design

- The design and implementation of a GIS would involve, ideally, representatives of all the HRCC's units (Insurance, Employment, and I&C). This would contribute to ensuring that all pertinent information (e.g., programs and services available, rights and obligations under EI) is presented to GIS participants and that they come out of the GIS well-informed of the avenues open to them in their search for employment.

- It would be beneficial for an HRCC which contracts out the delivery of a GIS to remain involved in its evolving design. While attending all the sessions delivered by the third-party is not a requirement, attending some of them would potentially give HRCC staff ideas as to changes that might better meet the needs of EI clients. Ongoing involvement in the evolving design of the GIS would also ensure that any relevant changes (e.g., changes to the legislation) are incorporated in the content of the group sessions.

6.1.2 Client Selection

- Based on the experience of the sites researched, targeting specific client groups (e.g., seasonal workers) for GIS is not the most effective way to deliver the GIS. One reason is that ensuing reactions (e.g., from clients, unions, the media) can be negative. Another reason is that mixing individuals with various occupational backgrounds in group sessions was believed to be beneficial for participants who want to network. Lastly, GIS can be an effective way to inform clients not only about their rights and obligations but also about the programs and services available to them. This is something from which all clients can benefit. One exception to not targeting specific client groups to attend GIS is workers in the educational field.

- Because the letter directing participants to attend a GIS must hold under appeal, it must be worded very clearly and leave no room for confusion or misinterpretation as to the consequences of not attending the GIS. However, because the tone of such a letter can be intimidating, providing more information on the content of the session would be one way to make the letter less stern and put participants in a positive frame of mind.

6.1.3 Implementation

- Deliverers who possess the right skills for the job (e.g., presentation skills, ability to deal with people) make the GIS presentation more interesting and less dry for participants. This also ensures that participants get as much out of the sessions as possible, since the right facilitators will encourage participants to ask the questions they need answered.

- If many HRCCs located in the same management area are involved in the delivery of the GIS, consideration should be given to centralising GIS-related activities (e.g., scheduling the GIS, entering results) within one HRCC. This makes the process more efficient than would otherwise be the case. It also allows procedures and messages sent (to clients and third-party

deliverer, if relevant) to remain consistent.

- The delivery of the GIS at a minimum of two weeks into a client's claim ensures that participants are able to focus on the session. Before that, participants' thoughts are more likely to be focused on their recent job loss and the related financial consequences, and they are less likely to absorb and remember the information delivered at the session.

6.1.4 Delivery

- The duration of the type of GIS to be implemented is linked to the type of GIS considered. While 45 to 60 minutes appears to be ideal for a straightforward presentation that will maintain participants' interest, a longer, workshop-type session is more effective if the objective is to make participants re-think their job search and labour market approach, and give them an overview of the options opened to them.

- Co-delivery of GIS appears to be an effective model to use. For longer sessions, this helps to ensure that the delivery remains "fresh". For shorter sessions that might be more repetitive in nature, this ensures that the sessions do not become too repetitive or a monotonous part of the deliverers' job.

- As explained above, it is important that the GIS presenters or facilitators possess the right skills in order to make the session interesting to participants. While formal training might help a facilitator with the mechanics of presenting to groups, the natural abilities of the deliverers might be more important than formal training to make an individual effective in this role.

- Relatively small groups of clients (20-25) with heterogeneous backgrounds are more manageable than larger group sizes of participants with homogenous backgrounds. Participants that have the same background might be more likely to "stick" together and react negatively to the session's message than less homogeneous groups.

6.1.5 Content

- While a tightly scripted delivery might ensure consistency of information, more flexible sessions are more effective at meeting the individual needs of participants. The right balance of these two factors when designing a GIS depends on the objectives of the specific GIS implemented.

- If it is desired that forms be completed by participants in the group information session, sending these forms with the letter

directing them to attend and asking participants to complete them before coming to the session would minimise the time spent completing the forms at the session.

- One benefit of selecting a third-party organisation with close links to the employer community as the deliverer of a GIS is that this organisation might be aware of job opportunities that it can pass on to participants, therefore adding value to the sessions for these participants.

6.1.6 Monitoring and Follow-Up

- The GIS participants who were followed up subsequent to their participation in the GIS delivered in Mississauga appreciated the follow-up call, especially when this call was viewed as a way to further help those who had not yet found a job make their job search more effective. Third-party deliverers might have more resources available to ensure that this follow-up takes place.

- While following up participants can be a way to assist them in modifying their job search and make it more effective, it can also provide additional opportunities to uncover situations of fraud and abuse, and achieve additional savings.

6.1.7 Administrative Costs

- A tracking system that would include the monitoring of the costs associated with coordinating and delivering GIS would ensure that the cost-benefit issue is accurately reflected in any future reporting.

6.1.8 Accountability Framework

- One of the major gaps identified through the course of this monitoring study was the lack of a consistent electronic system that would provide accurate calculations of savings and other related information by HRCC and by type of GIS.

6.1.9 Impacts on Clients

- Claimants who attend a GIS generally feel that they are slightly more knowledgeable of their EI rights and responsibilities, and of the services available to them to find work, than they would be if they had not attended. The GIS can therefore be an effective way to inform clients in a more efficient way than would be the case if the information were provided to them individually.

- Providing information to claimants on a variety of issues

through GIS can have some impact on their behaviour. For example, some participants in Mississauga changed their résumé as result of attending the Booster Session there, which might have a positive impact on their ability to find a job. In Lethbridge, some participants reported that they were going to be more careful about how they filled out their cards, which would reduce the costs associated with checking and sending back cards on the part of the HRCC.

- Participants had mixed views on the usefulness of the GIS. This tends to be the case when participants are unsure of the objectives of the GIS and consequently create their own rationale for why a GIS is held. Participants are likelier to be disappointed with their participation if they feel that the session did not live up to their expectations.

  Participants who attend more than one type of GIS can feel that the information with which they are provided is repetitive. If more than one type of GIS is presented in one management area, care should be taken to coordinate these various sessions to ensure that any duplication of information is minimised.

6.1.10 Other Lessons Learned

- Despite the emphasis that has been put on the GIS as a means of achieving savings, these sessions are also viewed as an effective means of providing useful employment-related information to clients which will help them in their job search.

- Obtaining feedback from GIS participants on their satisfaction with the session they attended can be an effective way of identifying areas for improvement. Ideally, client feedback on satisfaction would be anonymous to ensure that comments are as honest as possible and not tainted by the fear that what they say could have an impact on their benefits or ability to access services.

6.2 Steps for the Effective Implementation of GIS Based on Findings

Based on the experiences of the three sites researched through this monitoring study in designing, implementing and delivering the GIS, a number of factors have been identified which should be considered by other HRCCs that might be interested in implementing a GIS. These factors are outlined below under a number of themes.

6.2.1 Design

- A cooperative approach maximised the design and delivery of

the GIS. A committee comprised of representatives from Insurance, Employment, and I&C could be established to ensure buy-in from management from all sides.

- If the sessions are delivered by a third-party, encourage HRDC staff to attend the sessions to witness their value first-hand and limit the negativism that can surround contracting out.

- The message sent to clients through a letter directing them to attend, especially the message concerning the impacts on their claim of not attending a session, should be very clear and unambiguous.

- Throughout session delivery, focus on educating the client rather than on "catching" them. If serving a general audience, ensure that the information which is provided is simple, easy to understand and straightforward. If Rights and Obligations is part of the GIS, place equal emphasis on Rights and Obligations as on Employment Services.

- Include information on future employment trends. This builds a "reality check" into the sessions.

- Clarify the objective of the information session for clients. By making clear the reasons for their requirement to attend the session and the expected content of the session, participants are less likely to feel threatened and more likely approach the event with a more positive outlook.

6.2.2 Implementation and Delivery

- Ensure the support of management, particularly key leaders within the HRCC, prior to introducing the GIS.

- Ensure that the physical facility (e.g., meeting space, audio visual equipment, parking, seating) meets the operational needs required to deliver the session.

- Identify a central point for the coordination of all activities to ensure the consistency of the information communicated and of the activities undertaken. There should be one coordinator specifically assigned to the GIS, whether it is delivered by the HRCC or a third-party. In addition, the respective responsibilities of the project officer (in the case of a third-party delivery) and coordinator (if they are different persons) should be clearly delineated.

- Use a stepped approach to implement the sessions. For example, follow-up activities could be delayed until the sessions are

running smoothly and the level of resources required has been inventoried.

- A clear and achievable work plan is important. The work plan communicates goals, objectives and the methodology to staff/third-party. Designers and deliverers can then work together towards a common goal. A work plan is also helpful because it keeps the role of the GIS in perspective.

- Clearly document the procedures associated with a GIS (e.g., scheduling participants, handling cancellations, entering related information in the systems) and communicate these procedures to all levels, from front-line staff to Directors. Review these procedures on an ongoing basis to ensure that appropriate system practices are in place.

- Consider delivering the session where there is access to a resource centre. This way, the resources available to participants can be incorporated into the sessions (e.g., by giving participants a tour of the facilities, introducing clients to the use of the computer and publications).

- Consider conducting periodic reviews to identify potential groups of "like" claimants who may require specialised attention through modified group sessions.

- Consideration can be given to the use of a contract to provide GIS through a community service provider. Enhancements to the content of the group sessions, such as emphasis on Employment Action Planning, could be considered. This could occur if the HRCC decided to focus internally on other employment activities or if staffing resources become stretched due to other activities and priorities.

- Compile a monthly/quarterly activity report to inform staff/third-party about activity levels and trends, observations and recommendations related to the GIS.

6.2.3 Client Monitoring and Follow-Up

- Consider implementing a telephone system with "call display" (if not already in place) since this can be used as a tool to detect potential fraud. For example, a participant might call to cancel his participation because he says he is sick, but the call display might show that he is actually calling from a known employer.

- Where appropriate, conduct quarterly follow up to ensure that the Units of Business accurately reflect activity levels and take corrective action if they do not (e.g., direction regarding proper

use of screens and inputs by staff).

6.2.4 Administrative Costs

- Track and determine the administrative costs associated with the introduction and delivery of the GIS in order to determine the net savings of the activity.

6.2.5 Accountability Framework

- Consider GIS as a potential source of activity to contribute directly to the office's HRIF Accountability results. Specifically, if results for Case Managed Clients are falling short of objectives, consideration could be given to case managing (from a tracking perspective only), all or a portion of GIS participants.

- Ensure that systems are in place, or set up tracking mechanisms, to ensure that activities attributable to the GIS can be measured accurately (e.g., how many claimants were scheduled, how many attended, FTRs, cancelled or rescheduled, the amount of direct and indirect savings generated).

6.2.6 Impacts on Clients

- Unless a formal tracking and follow-up system is in place, impacts on clients, other than anecdotal ones, will be difficult to assess.

6.2.7 Satisfaction with GIS

- Include an anonymous monitoring and/or evaluation component as part of the delivery of the GIS. This will assist in making needed changes or modification to the session as required on an ongoing basis.

Footnotes

1 "Preliminary Report, I&C Interview Strategy", Control Policy, November 8, 1993. ▲

2 Refers to original Evaluation Issue Section(s) and Question(s). ▲

3 The 50/250 initiative was a proposal to Treasury Board to obtain $50 million in additional funds for the I&C function, under the

condition that HRDC bring back $250 million to the EI account. Although these are not the exact figures agreed upon by the Treasury Board and HRDC, the initiative is still referred to as the 50/250 initiative. ▲

4 Although using the number of D15s is not an accurate count of FTRs (since there would be more people who would fail to report than would end up being disentitled), it is the closest value that is tracked. ▲

5 The FTR rate for the current year is significantly lower than previous years for three reasons. First, the rural GIS began in 1997 and the FTR rate for these sessions are lower than those at the Lethbridge CASC. Second, the investigations that were started in December of 1997 had not reached the stage of disentitlement at the time the study was conducted. Third, session deliverers felt that claimants are realising that attending the GIS is mandatory and are now more likely to attend than they were in the past. ▲

6 It is important to keep in mind that this is not a scientific survey and should therefore not be taken to be representative of the EI population. Also, it should be kept in mind that a larger number of GIS participants than non-participants participated in the survey, given the number of focus groups conducted. ▲

7 This cost is based on an average number of 7,892 scheduled clients per year. ▲

8 This is not entirely true. A few participants were working a the time of the focus groups. Others were in the process of starting their own business. ▲

9 Provided an ROS appointment can be rescheduled within five days or immediately following any temporary employment. ▲

10 Since savings are calculated region wide and not attributed directly to either the Richmond Hill or Newmarket HRCC, in order to determine estimated saving per client, the total number of clients who were scheduled for an ROS in York Region was used. ▲

11 Only three persons attended the non-participant focus group, making it difficult to draw conclusions based on such a small sample size. ▲

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